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ABSTRACT

The views of users of e-learning in Europe and elsewhere were examined through seven online surveys that were posted on the interactive World Wide Web site called The European Training Village. The surveys examined e-learning users' views regarding the following topics: technology-supported learning; e-mail in e-learning; trainers' skills for e-learning; the economics of e-learning; e-learning and adult basic skills; e-learning for people with disabilities; and training of trainers and teachers. The surveys attracted approximately 3,213 respondents, 19% of whom were trainers or teachers in schools and universities and 14% of whom were training managers or trainers in companies or the private sector. The following were among the key findings: (1) 42% of respondents said that 0-25% of their learning was currently supported by technology; (2) uses of e-mail in e-learning included sending instructions and assignments, surveying learner views, providing advice, and generating discussion; (3) costs of developing or purchasing e-learning products and services elicited the greatest concern in the survey on the economics of e-learning; (4) respondents were optimistic regarding e-learning's potential contribution to teaching adults in need of basic skills instruction and disabled individuals; and (5) most respondents anticipated spending more time on e-learning professional development in the future. (Questionnaires are included. Contains 48 figures.) (MN)

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Users' views on e-learning

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Cedefop online surveys

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Cedefop online surveys

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Introduction

Background

Users' views on e-learning brings together the results of a number of online surveys on e-learning carried out by Cedefop's interactive website the European Training Village (ETV) http://www.trainingvillage.gr. This introduction provides some background to the use of surveys as a tool to collect information and the methods used to construct and conduct them.

For the purposes of these surveys, e-learning is defined as learning supported by information and communication technologies (ICT). E-learning is not limited to 'digital literacy' (the acquisition of information and communication technology competences). It may encompass multiple formats and hybrid methodologies: the use of software, Internet, CD-ROM, online learning or any other electronic or interactive media.

Using online surveys

Online surveys have been used as a tool to collect data on e-learning to fill a clear information gap about how it is developing and people's perspectives of it. The aim is to collect data of interest to specialists and researchers in vocational education and training. The surveys are not a statistical analysis of developments, but aim to collect sufficient quantitative information to provide some insight into the state of certain aspects of e-learning.

The e-learning surveys have been very carefully structured. Topics have been selected on the basis of issues identified as of particular interest to target groups, such as trainers, universities, enterprises and trade unions. Questions were prepared in consultation with experts in vocational education and training. Each survey was published online in English, French and German and was left open for six weeks.

The surveys carried out

From December 1999 to September 2001 Cedefop carried out seven surveys on different aspects of e-learning:

(a) technology-supported learning – which provides views of training practitioners and policy-makers on technology usage and information requirements;

(b) e-mail in e-learning – which monitored the use of e-mail by trainers and learners as both a learning and communication tool;

(c) trainers' skills for e-learning – which examined the extent to which trainers felt equipped to develop and use e-learning material;

(d) economics of e-learning – which looked at calculating the costs of developing e-learning content and online support;

(e) e-learning and adult basic skills – which identified some of the interests and concerns of vocational training professionals and policy-makers in using e-learning to support the development of basic skills among adults;

(f) e-learning for people with disabilities – which aimed to find out more about the level of interest and activity among the ETV respondents on e-learning for people with disabilities; and

(g) training of trainers and teachers – which aimed to explore the degree of current investment in teachers' and trainers' professional development in designing, delivering and supporting e-learning.

This publication reports on each of the above surveys. They outline the number of respondents and identify them by organisation type. The surveys combined have attracted over 3 213 responses and together build up a picture of developments in some key areas of e-learning.

Further information about Cedefop's e-learning surveys carried out through the ETV can be found at the survey section of the website www.trainingvillage.gr.

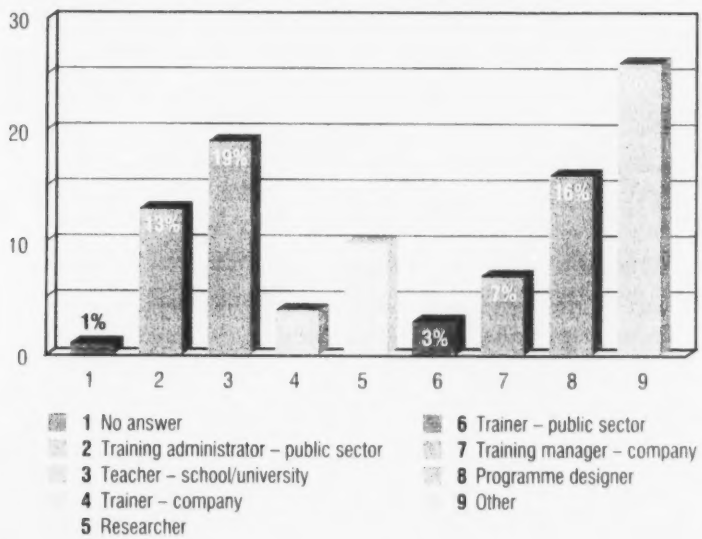
1. Technology-supported learning

In December 1999, The European Training Village (ETV) launched a survey on the use of technology in learning and received over 650 responses.

The objective of the survey was to obtain the views of training practitioners and policy-makers on technology usage and the kinds of information and good practice guidance training practitioners require.

1.1. Who responded?

Figure 1: How would you describe your primary role?



The largest percentage of respondents are involved in training and teaching, either as teachers in schools and universities (19 %), training managers/trainers in companies or private sector (14 %). Among those listed as 'other', almost a third give job titles which suggest direct training responsibility or the management of training functions (Figure 1).

Of the 26 % that describe themselves as 'other' than the categories listed quite a high percentage are involved in project websites and management. There are 32 people who describe themselves as consultants and a smaller number specifically involved in information and communication technology as experts, designers and information analysts.

1.2. What technology?

With regard to the technology used in training either for administration, training or learning – the worldwide web comes in highest at 88 % as the most widely used technology. Importantly, e-mail comes in second with 82 %, an interesting figure given that e-mail is often overlooked in the focus on more sophisticated technologies. CD-ROM/DVD is important too as a medium for learning with 80 % stating they used it.

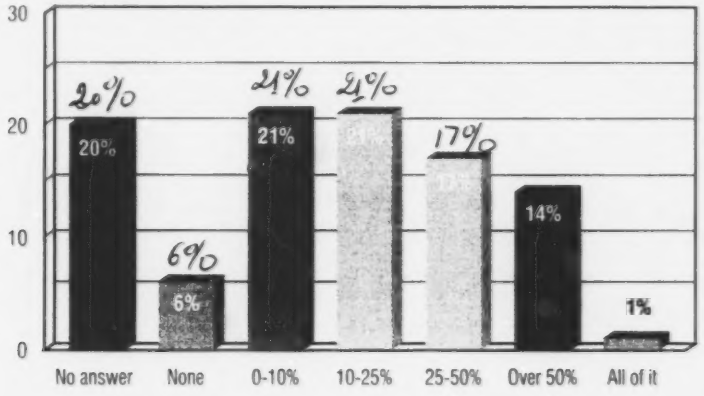
Correlating some of the data across job titles, more teachers in schools and universities use the worldwide web than any other job category – not surprising as their access to the web is likely to be greater and their experience of using the web longer than most other training practitioners. Unsurprisingly researchers and training programme designers also have very high web use (92 % and 84 % respectively). Although, the number of company trainer respondents is small (28), nearly all of them use the worldwide web more than any other technology, but their managers, including human resources managers still use CD-ROM/DVD most.

Training administrators in the public sector state that e-mail is the most used technology and 90 % of trainers in the public sector use CD-ROM/DVD more than any other technology. This might suggest that public sector training provision outside universities is slower to adopt new technologies. However, without previous data, no trend can be identified, but other questions about future intentions suggest that a significant proportion of learners and trainers are at a relatively early stage of adopting technologies.

1.3. How is it used?

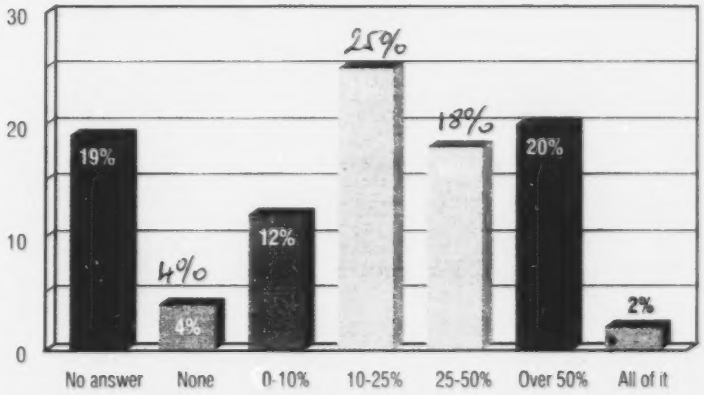
The largest category of respondents (29 %) said that they experienced technology-supported learning as a teacher/trainer. Almost the same percentage of people (28 %) experienced technology-supported learning as learners.

Figure 2: As a learner, what percentage of your learning is currently supported by technology?



The largest category of people (42 %) said that 0-25 % of their learning was currently supported by technology. The percentage is quite low, so it is assumed that technology was recently adopted as a tool of learning. Only 14 % claimed to use technology in more than 50 % of their learning (Figure 2).

Figure 3: In 12 months time, how much of your learning will be supported by technology?



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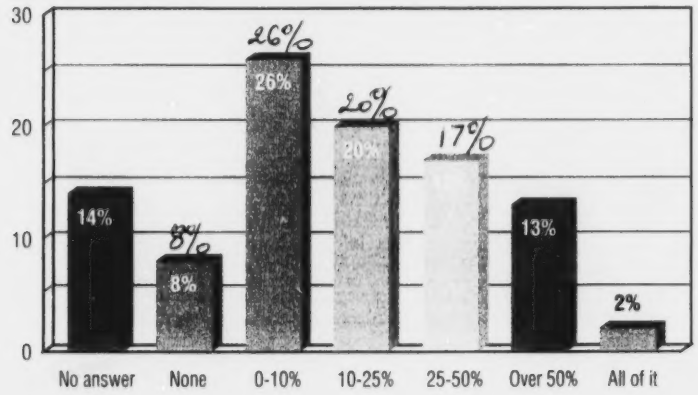
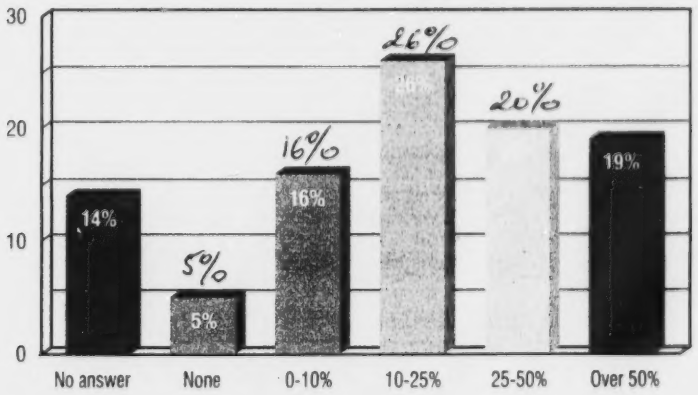
Of the people who support their learning by technology, 25 % said that in 12 months time the percentage of their learning supported by technology would be between 10 and 25 %. Some 20 % of them said that over 50 % of their learning would be supported by technology. In combination with the previous question, this suggests that learners intend to support more of their learning by technology in the future (Figure 3).

Figure 4: As a trainer or administrator, what percentage of your teaching is currently supported by technology?



When it comes to teaching, 20 % of respondents said that 10-25 % of their teaching was supported by technology. A further 17 % said that between 25-50 % of teaching was supported by technology. Only 13 % said they used technology in more than 50 % of teaching (Figure 4).

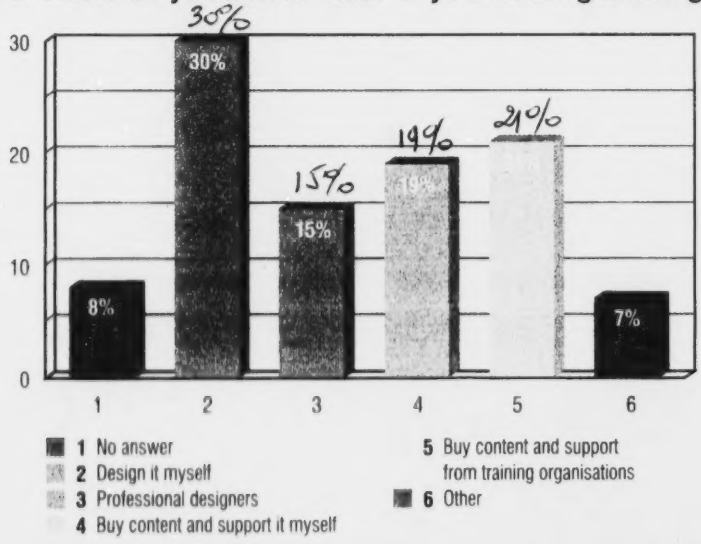
Figure 5: In 12 months time, how much of the training for which you are responsible will be supported by technology?



In the future, more than a quarter of respondents (26 %) said that 10-25 % of their teaching would be supported by technology in 12 months time. Some 20 % of them said that 25-50 % of their teaching would be supported by technology and 19 % said they would use it in over 50 % of teaching. This points to a future increase, though no rapid growth, in the percentage of teaching supported by technology by trainers (Figure 5).

1.4. Where do respondents find learning content?

Figure 6: Where do you source most of your training/learning content?



The largest percentage (30 %) of respondents say they design learning content themselves. Some 21 % buy content and support from educational and training organisations, and 19 % buy the content but provide their own support to externally-sourced materials, and 15 % commission content from professional designers (Figure 6).

Overall, most content is sourced externally. The reasons for this are not clear. The reasons for caution about switching to technology-supported learning also need to be explored. It will be useful to establish if it is due to an absence of offers from external sources, the quality of existing offers, or resistance from those purchasing or commissioning training.

1.5. What information services are of interest to practitioners?

'News' items that focus on technology in education and training were requested by 83 % of respondents. 'Products and services information' is of interest to 70 % of respondents, nearly 40 % are looking for reviews of technology-supported learning products and services, and over 70 % are interested in research behind the use of technology in learning. 60 % would like case studies and 55 % information on technologies and tools. These figures suggest a lively concern for real information about what is available and how effective it is.

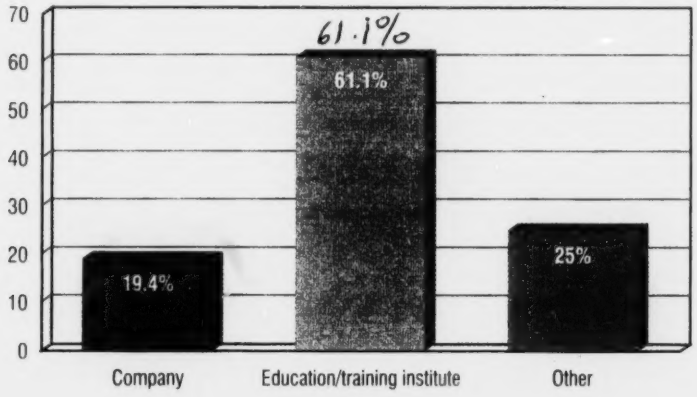
2. E-mail in e-learning

In June 2000, the European Training Village (ETV) launched a survey on the use of e-mail in e-learning. 355 people responded.

The objective of the survey was to monitor the use of e-mail by trainers and learners as a learning and communication tool between professionals.

2.1. Who responded?

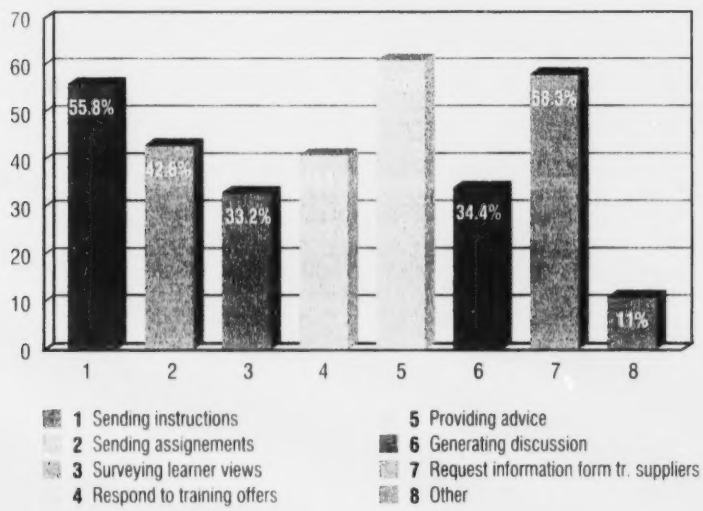
Figure 7: Where are you located?



The largest percentage of respondents were from education/training institutes (61.10 %) (Figure 7). Among those listed as 'other' (25 %), more than two thirds gave job titles that suggest direct involvement in education and training. Some 19.4 % of respondents work in companies.

2.2. Use of e-mail as a learning tool

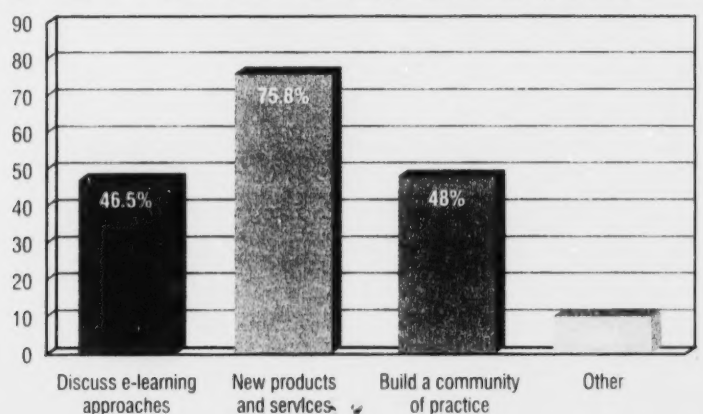
Figure 8: Use of e-mail for learning purposes



With regard to the use of e-mail for learning purposes, 'providing advice to learners' comes in highest at 60.6 % as the most popular reason for using e-mail in a learning context. 'Sending instructions to learners' comes in third with 55.8 %, with 'requesting information from other training suppliers' second with 58.3 % (Figure 8).

2.3. E-mail as a means of communication and cooperation between professionals

Figure 9: Use of e-mail when working with other professionals



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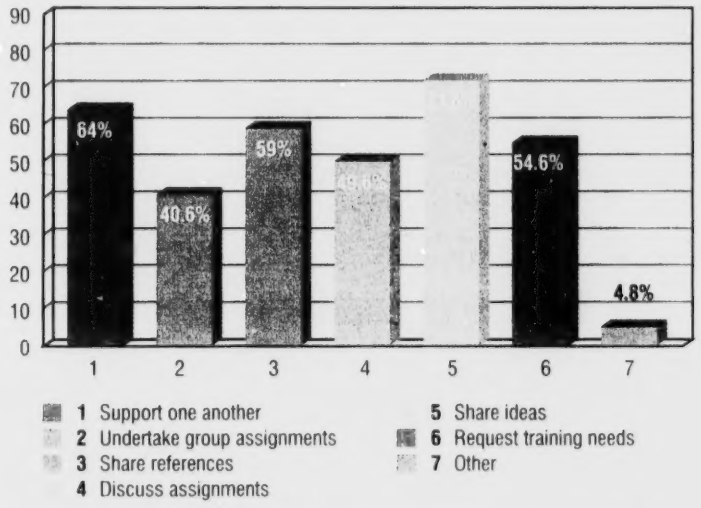
In working with other professionals, the largest percentage of respondents (75.8 %) say they use e-mail to 'look for new products and services'. Some 48 % use it to 'build a community of practice' and almost half (46.5 %) use it to 'discuss e-learning approaches'. Definitions of a 'community of practice' are, however unclear and other technologies and methods used to build these communities are not identified.

2.4. Expected use of e-mail by learners

Figure 10: Expected use of e-mail by learners



Most trainers (71.8 %) expect learners to use e-mail for 'sharing ideas'. Importantly, to 'support one another' is the second most expected reason to use e-mail by learners. To 'share references' comes in third with 59 %. Some 54.6 % of trainers said that 'request training needs' is another reason they expect learners will use e-mail for (Figure 10).

A recent publication on e-moderating from Gilly Salmon of the Open University (http://www.oubs. open.ac.uk/e-moderating/) provides a five-stage model. It suggests that interactivity and peer activity in e-learning environments occur and build only after learners have developed a certain level of experience. Sending and receiving messages is part of this early process of online socialisation.

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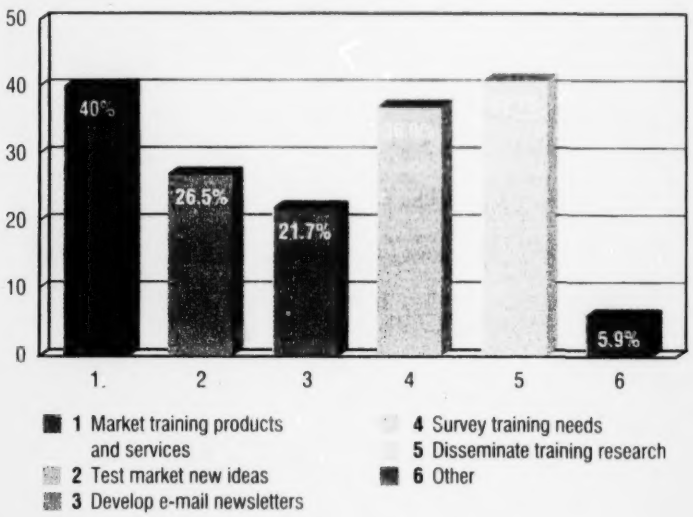
2.5. Use of e-mail by trainers

Figure 11: Use of e-mail by training providers



The largest category of trainers (41.1 %) use e-mail to 'disseminate training research'. Almost the same percentage of respondents (40 %) use e-mail to 'market training products and services' (Figure 11). These two statistics suggest a fairly even balance of respondents between those working in research and those in e-learning design and delivery. Some 36.9 % use e-mail to 'survey training needs'.

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3. Trainers' skills for e-learning

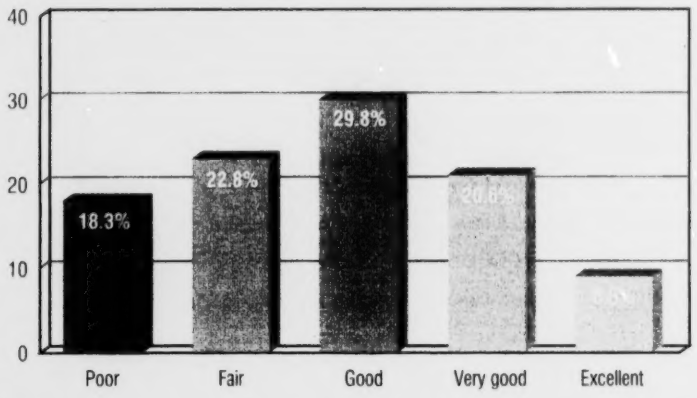
3.1. Who responded?

This survey was carried out in October 2000. Just over 500 respondents completed the survey of which 26.8 % work in a public training organisation and 16.5 % in private training firms. Some 16.4 % are trainers in non-training organisations, public and private and 28.4 % are in further and higher education. The majority of the 'Other' work in training consultancy, education and training and/or providing or managing training as part of a wider set of professional activities.

3.2. Current skills levels

Respondents rate their pedagogical expertise, ability to work in cooperation and project management skills for e-learning quite highly. Technical and business skills get fewer ratings.

Figure 12: Ability to write a pedagogical specification for an e-learning environment, tools and content



Some 30 % of total respondents rate their ability to write a pedagogical specification for an e-learning environment, tools and content as either very good or excellent. When good, very good and excellent are combined, nearly 60 % reckon the are doing a good job or better. However, 46 % of respondents from

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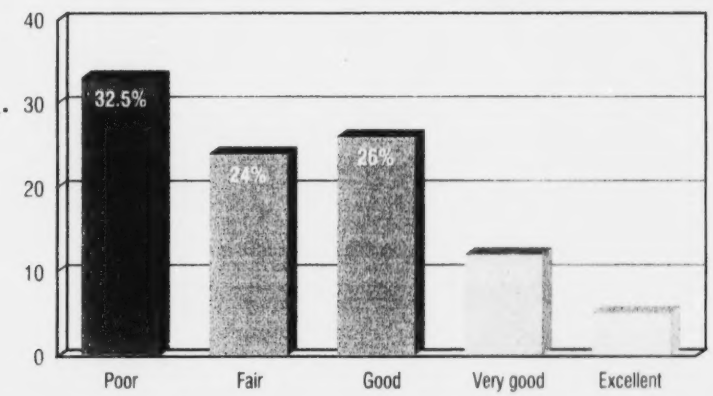
private training organisations rated their skills in this area as fair or poor, rising to 57 % among trainers in private enterprises (Figure 12).

One of the most interesting differences between groups of respondents emerges in cooperative working and e-moderating. Some 43 % of those working in non-training public and private enterprises rate their skills as very good or excellent but this falls to 34 % for those working in public or private training bodies. Only 30 % of those working in universities and colleges of further and higher education rate their ability in cooperative working and e-moderating as very good or excellent. It is interesting that education and training bodies appear weaker in these critical aspects of e-learning than those working in organisations not primarily directed at education and training. It is not clear if this reflects the structure of the sample, or a culture of individualism, resistance to change among education and training organisations or other factors.

Figure 13: Ability to write a technical specification for an e-learning environment and tools for design, delivery and evaluation



Ratings change dramatically when it comes to technical skills. Almost one third consider their technical skills poor, and nearly 24 % rate them only fair. This means over 50 % of respondents believe their technical skills are only poor or fair (less than good) and only 17.5 % rate them either very good or excellent (Figure 13).

The results relating to business skills are equally dramatic. Some 54 % rate their ability to write a business specification for an e-learning environment (platform), tools and content as poor or only fair and a mere 19.1 % rate it as very good or excellent. There are some differences between those working in public sector training bodies and organisations (18 % and 19 %), and those working in private training firms (24 %) and enterprises (21 %). Universities and further

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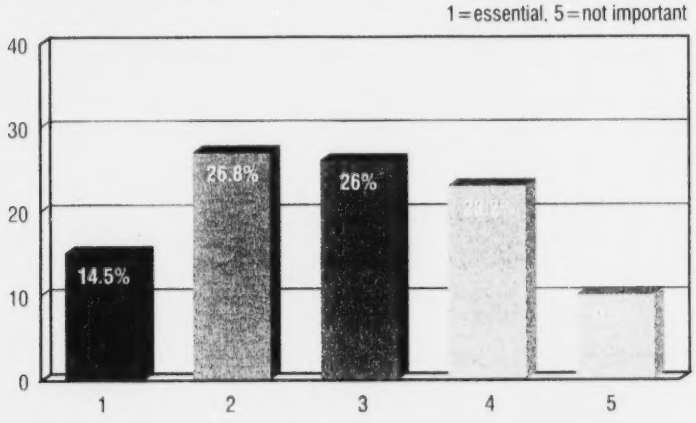
and higher education respondents have the lowest percentages at very good and excellent (16 %).

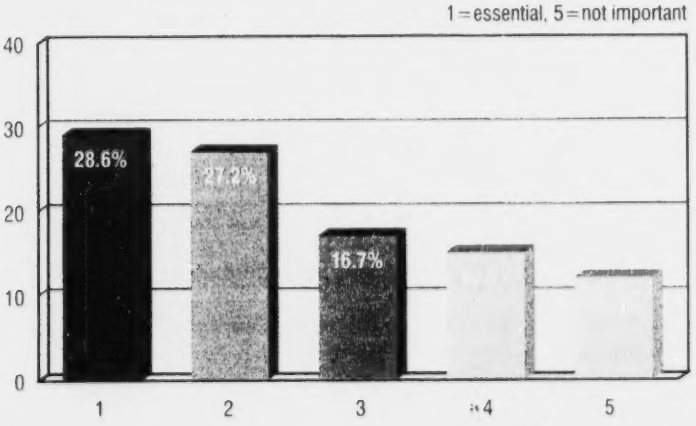
3.3. What importance is placed on technical, pedagogical and business skills in e-learning?

Figure 14: How important do you rate the ability to write a technical specification for an e-learning environment?



Although more than half of respondents rated their technical skills as only poor or fair, more than two-thirds believe it important to have the ability to write a technical specification (Figure 14).

Figure 15: How important do you rate the ability to write a pedagogical specification for an e-learning environment?



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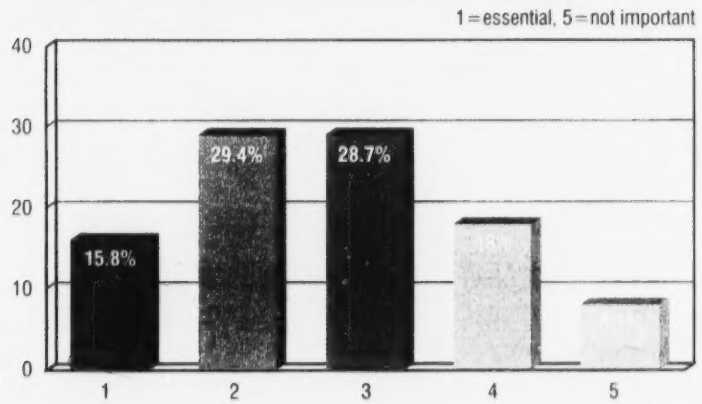
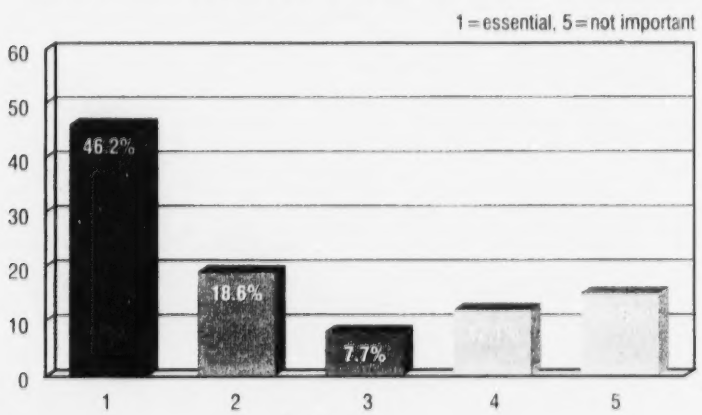
The position on pedagogical skills is somewhat but not hugely different – with 72.5 % giving these skills a rating of 1 to 3, as opposed to 67.3 % for technical skills with the same rating (Figure 15).

Figure 16: How important do you rate the ability to prepare a business case for an e-learning environment?



A difference emerges in the weighting of what professionals consider 'essential', however. Half give technical skills a rating of 1 (14.5 %), which doubles to 28.6 % for pedagogical skills. The ratings for the importance of being able to write the business case is very similar to technical skills with only 15.8 % saying the ability to prepare a business case for e-learning is essential. Of respondents, 76 % think that project management is important, very important or essential (Figure 16).

Figure 17: How important do you rate the ability to moderate and stimulate groups of learners in a virtual workspace?



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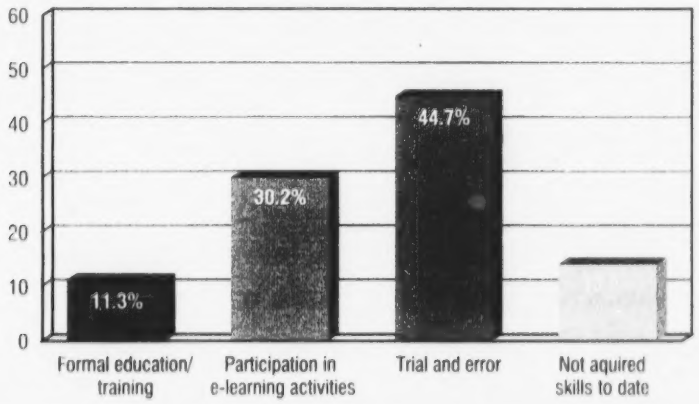
Reflecting a strong concern and interest in hybrid and cooperative pedagogical approaches, 39 % think that to be able to cooperate across professional, cultural and geographic boundaries is essential. Some 46.2 % think it is essential to be able to moderate and stimulate groups of learners in a virtual workspace (Figure 17).

Figure 18: How have you and your colleagues acquired these skills and expertise?



How have training professionals acquired e-learning expertise to date? One of the most important results of the survey is that only 11.3 % of all respondents say they have had some formal education and training programme in e-learning and 44.7 % say they have learned through trial and error without formal expertise being provided (Figure 18). Half of respondents working in universities or colleges of further and higher education said they learned through trial and error. For trainers in public or third sector organisations, this rises to 56 %. Some 25 % of trainers in private enterprises have not acquired any e-learning expertise to date.

3.4. When will new e-learning expertise be needed by the majority of trainers?

Over 80 % believe they need new pedagogical expertise in designing and delivering e-learning either now or within the next 12 to 24 months. Encouragingly, nearly 75 % believe they would need new business expertise to evaluate the benefits of e-learning on job performance in the same time frame. Some 63.3 % state they need cooperative working and learning expertise either now and/or within the next 24 months.

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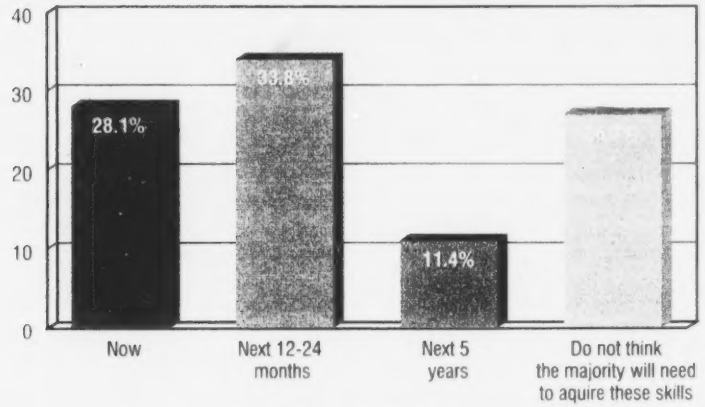
Figure 19: When do you think the majority of training professionals will need to acquire the following skills and expertise?



When asked when e-learning skills and expertise will need to be acquired by the majority of training professionals, 28.1% said they needed technical expertise now/immediately. A further 33.8% said they needed it within the next 12 to 24 months. Some 26% said they do not think the majority of trainers will need to acquire these skills (Figure 19). Some 63.3% state they need collaborative working and learning expertise either now or within the next 24 months.

3.5. Overall trends in comments

Respondents were offered an opportunity to list their main concerns. There was a surprising consistency across the replies. Many wondered how they were going to learn to use the technology within a pedagogical environment. Large numbers expressed concern about their lack of technical skills and a need for and interest in having the expertise to evaluate quality and the impact of e-learning. There is little doubt from the answers that there is considerable anxiety among trainers about how to improve their own skills and expertise, worries about being left behind, and the difficulty of coping with changing technology and training requirements at the same time. A number said they were searching for more information and expertise in e-learning design and especially how to develop content and support systems. Many stated their dislike of concentration on technology in e-learning discussions and descriptions rather than the pedagogy, but there was also quite considerable recognition that technology can provide an opportunity to create new and innovative pedagogical approaches.

This report summarises the results of the November 2000 online survey as part of the e-learning activities of the European Training Village (ETV). Some 271 respondents completed the survey.

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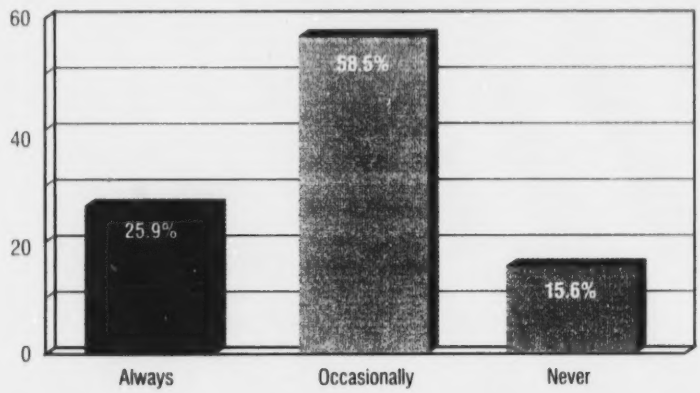
4. Economics of e-learning

4.1. Who responded?

Over 47 % of respondents were training providers, split almost equally between public and private training organisations. Of these, a small minority, 4.9 %, came from private sector e-learning firms and 2.6 % from public e-learning organisations. Some 39 % of total respondents came from public and private training organisations that provided e-learning in addition to other forms of training. Universities and colleges of higher and further education were a separate category and 22.3 % of the total respondents came from this group. Overall, public sector providers constituted 44.5 % of respondents. Only 4.5 % of respondents came from information and communication technology firms providing technology and/or communications used in e-learning. A large number of respondents were categorised as 'other', some of whom could be included as public training providers (a further 5 %) media providers, about 3 % and 2 % were consultants and researchers respectively. Some 8 % were public or social sector policy-makers.

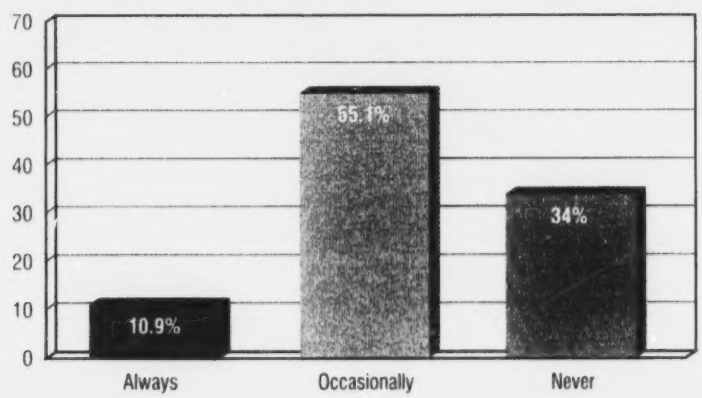
4.2. Internal versus external development and sourcing

Figure 20: Do you develop e-learning content within your organisation?



A large majority, 84.4 %, develop content within their own organisations. However, only 25.9 % of all respondents said they always develop content within their own organisations (Figure 20). This ranges from 31 % of private sector training respondents, falling to 27 % of universities and higher education colleges and 20 % of public sector training organisations. Interestingly, only half e-learning providers, public and private, develop their own content on all occasions.

Figure 21: Do you outsource the development of e-learning content?



Of total respondents, 66 % outsource content development some or all of the time (Figure 21). The majority of people who always outsource the development of e-learning content are those who work either as a private or as a public training provider supplying e-learning as well as other forms of training.

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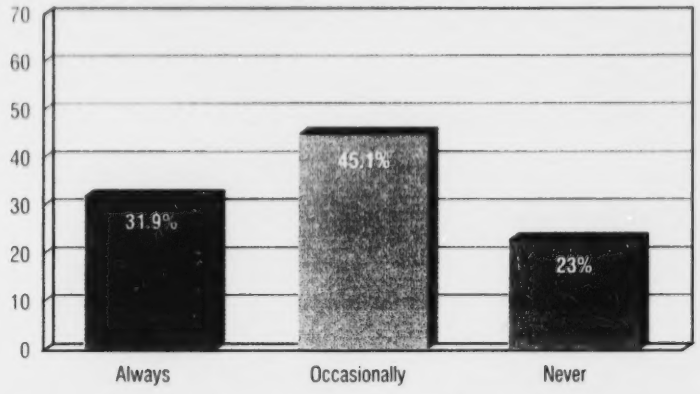
Online e-learning support comes from within the organisation in 77 % of cases, with only 5.3 % always outsourcing online support and 47.6 % of respondents outsourcing online support occasionally. Of public training providers, 36 %, 32 % of private training providers, and 36 % of universities always source their e-learning online support from within their own organisations.

Figure 22: Do you provide e-learning online support from within your organisation's staff?



It is unclear whether those who replied 'never' (23 %) to sourcing online support within their organisations did so because they do not actually provide online support at all, or because it is always sourced externally (Figure 22). What it does suggest is that outsourcing online support is undertaken by a majority of respondents on at least some occasions. This begs the question who are these external experts providing online support services and what are their characteristics?

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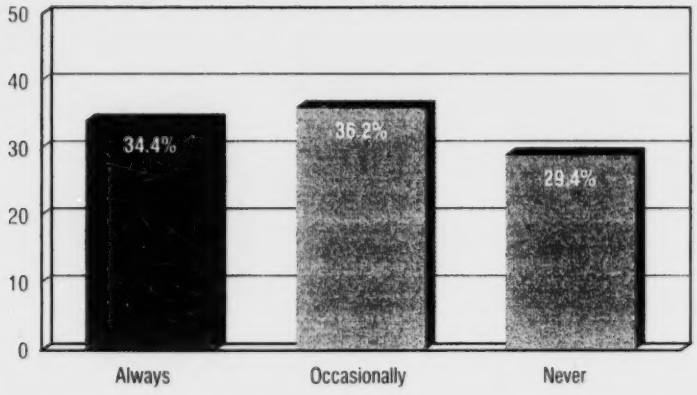
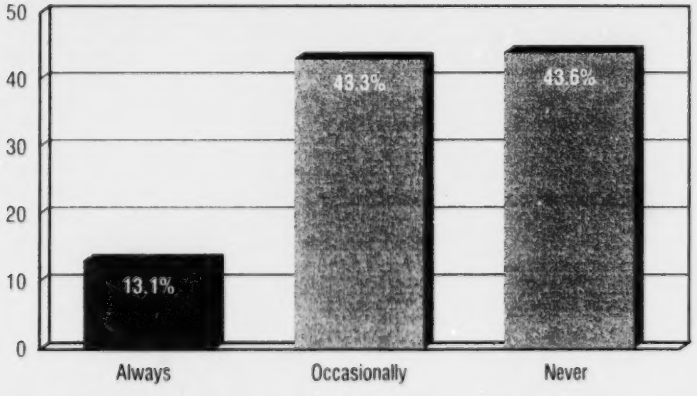
Figure 23: Do you provide technical support and maintenance for your e-learning environment in-house?



Perhaps somewhat more surprising is the response to questions about technical support (Figure 23). Only 34.4 % of the total always provide in-house technical support and maintenance ranging from 47 % of university respondents who said they always provide technical support in-house to 28 % of private training providers. Some 43.6 % of the total said they never outsource this type of support.

Figure 24: Do you outsource technical support and maintenance for your e-learning environment?



As expected most content would be developed internally. It was also expected that almost all online support would be internally sourced, but the survey showed more external support was used than expected (Figure 24). The reasons behind these decisions are unclear.

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4.3. Calculating cost

Figure 25: How do you calculate the cost of e-learning content?

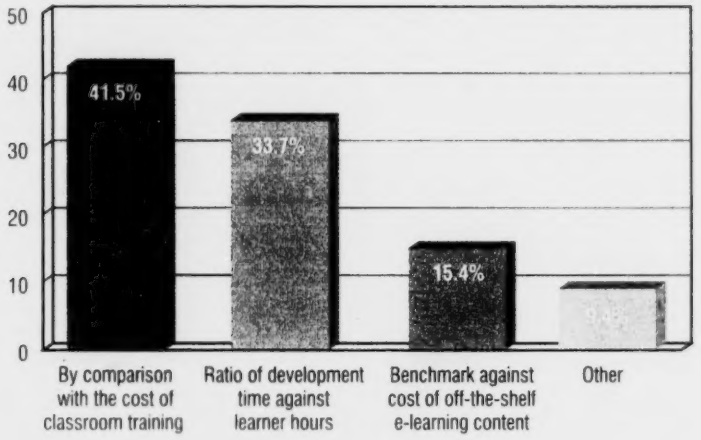
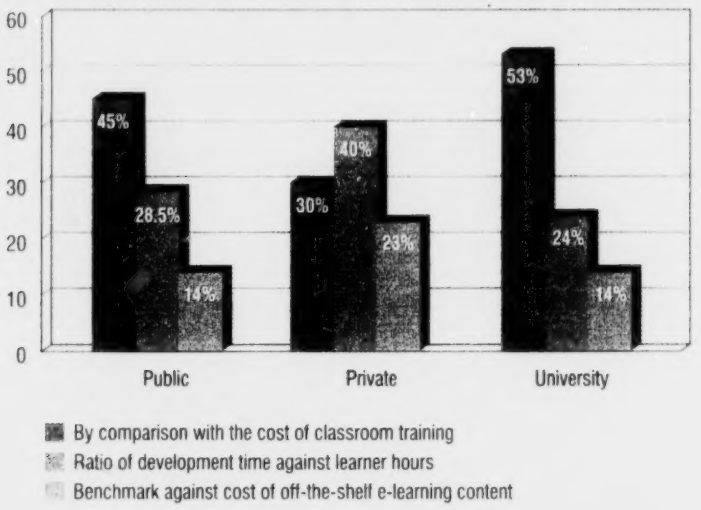


Figure 26: How public training providers, universities and private training providers calculate the cost of e-learning content



Some 41.5 % of respondents calculate the cost of developing e-learning content by comparing it to the cost of classroom training (Figure 25). There is quite a large difference between public training providers and universities 45 % and 53 % respectively, of which compared e-learning costs to classroom training

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costs (Figure 26). This drops to 30 % of private training providers. Some 33.7 % of the total responses calculate it according to a ratio of development time (hours) against learning hours, and again interesting differences appear between groups. Some 19 % of public training providers and 24 % of universities use this method and this rises to 40 % among private training providers. Of the total, 15.4 % use the cost of off-the-shelf e-learning as a benchmark. Of the almost 10 % 'other', most say they do not know or do not have a model or formula developed yet.

Figure 27: How do you calculate the cost of e-learning support?

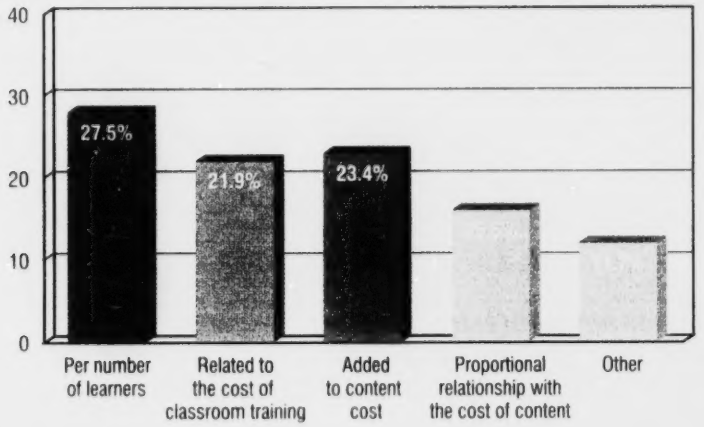
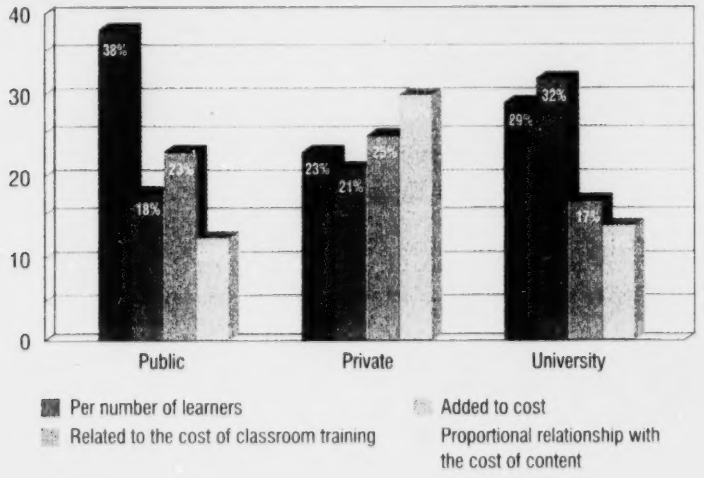


Figure 28: How public training providers, universities and private training providers calculate the cost of e-learning support



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When calculating the cost of e-learning support, 27.5 % say they use the number of learners as the basis for calculation (Figures 27 and 28). This rises to 38 % among public sector training providers and is only 23 % among private training providers. Almost 22 % say they relate the cost to costs incurred in classroom training and unsurprisingly this rises to 32 % among university and higher education respondents. Some 23.4 % add support to content costs and calculate total costs for a particular training objective. 15.5 % consider support costs in a proportional relationship to content, although 30 % of private training providers use this method. Of the 11.7 % 'other', again, the majority does not know, and rely on providers for information or have not developed a model.

Figure 29: Do you expect the cost of e-learning content to change in the next two years?

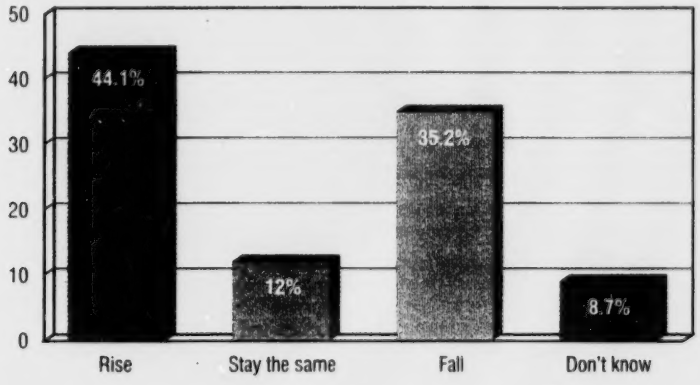
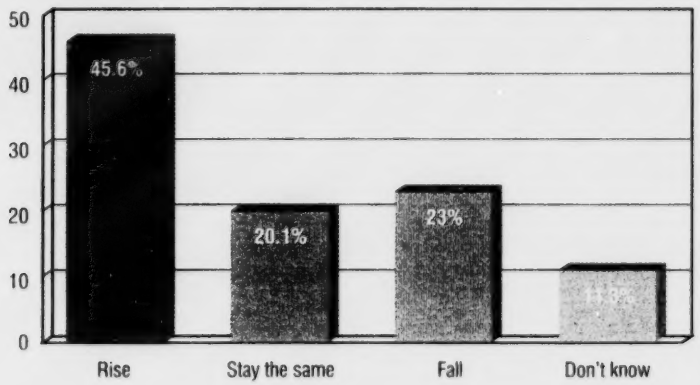


Figure 30: Do you expect the cost of e-learning support to change in the next two years?



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The largest proportion of respondents expects the cost of content (44.1 %) and support (45.6 %) to rise in the next two years (Figures 29 and 30). Public sector training providers dominate this expectation of rising costs where 56 % expect a rise in content cost and 47 % in universities also expect a rise. Some 50 % of information and communication technology firms supplying e-learning tools and platforms also expect content cost to rise. While 35.2 % of the total respondents expect content costs to fall, interesting differences arise between the public and private sectors – 42 % of private training providers expect content costs to fall, while only 30 % of public training providers and 11 % of universities expect a fall in costs.

There is much greater consensus concerning the cost of support with 46 %, 47 % and 47 % of public training providers, private training providers and universities respectively expecting a rise in costs. There is a similar pattern among those expecting a fall with an overall 23 % of the total expecting the cost of online support to fall within the next two years. It is unclear whether rising costs are expected as a result of improvements or market competition. Nor is it clear if falling cost expectations for support are due to reasons of increasing expertise among larger numbers of training professionals able to provide online support, or more intelligent automated systems.

4.4. Respondents' concerns

Respondents were asked to express their greatest concern relating to the cost of developing or purchasing e-learning products and services. There was a wide range of replies from respondents and the emerging themes are summarised below.

There is strong demand to improve the value of content with better pedagogical quality and evidence of improved performance impact, demonstrating real cost-effectiveness. Large numbers of respondents expressed concerns about quality and reusability of content. Concern about the poor quality of current e-learning offers is widespread.

This implies that in an immature market, buyers may be ready to purchase offers even if they are not considered to be of equal quality to classroom training. However, widespread adoption of e-learning will be constrained if purchasers are unsure of its quality.

There is a strong need among practitioners to develop the necessary skills and have access to models to calculate return on investment in e-learning. Many respondents felt they lacked the expertise and the models to calculate the costs and returns on e-learning investment. New skills are required by

those involved in training and beginning to adopt e-learning; new return on investment (ROI) models need to be developed and shared to increase effective decision-making.

Support costs added to content costs mean that the overall costs of e-learning are often higher than classroom training and there is strong concern that planners and suppliers underestimate the costs of support. Clearly, e-learning does not always reduce costs.

Many respondents expressed concerns about the cost of support and while recognising its importance in learning effectiveness, also stated that it was essential to ensure that it is economically viable to provide support. There is also concern to find and develop skills of online support experts. Education and training experts need to develop online moderation skills.

ROI models should take into account that a large proportion of e-learning will be used by target groups for which there will be no commercial return and these providers need good cost models that reflect their measurement for value criteria. Many respondents identified the need to develop products and services that can be accessed and afforded by those at an economic disadvantage throughout the world.

Given the large number of respondents from the public sector, it is not surprising that a large number expressed concerns about how public sector and social enterprise education and training providers can access capital development funds to invest in e-learning.

A number of respondents strongly advocated the need to tailor e-learning products and services to specific user needs and expressed concerns about the costs of this level of localisation, especially for small firms. They criticised the costs of maintaining and updating e-learning.

Generic e-learning products and services are rarely seen to be fully effective without some localisation but the cost of localisation is a huge barrier. New flexible means to localise and update e-learning is required if small and medium sized enterprises (SMEs) are to adopt e-learning.

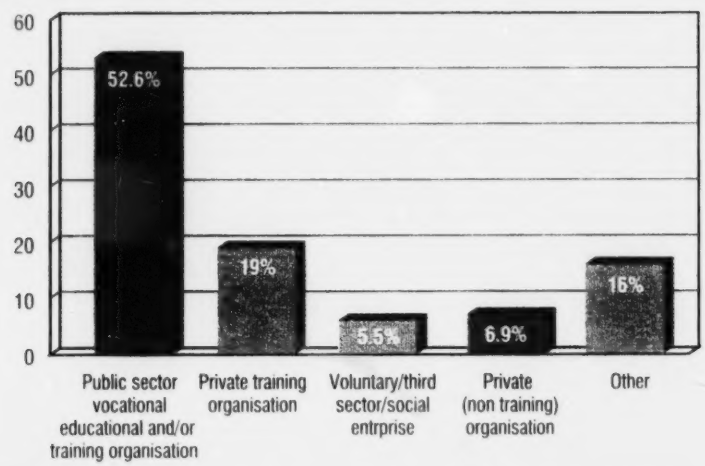
5. E-learning and adult basic skills

Over 590 replies to our survey on e-learning and adult basic skills were received. The survey was launched in early December 2000. Where differences occur in percentages between the text and the charts, this is due to removal of certain categories, e.g. 'Not relevant to me'.

Key messages to emerge are that there is a high level of optimism about the contribution that e-learning can make to the teaching and learning of basic skills for and among adults. Policy-makers and planners are rather more optimistic than teachers. Teacher and trainer skills are insufficient to take advantage of the opportunities offered and teacher skills development remains the most important issue to be addressed. Access to resources needed to develop teacher and trainer skills is considered lowest among those working in teacher and trainer training.

5.1. Who responded?

Figure 31: Where do you work?



Of those who responded, over half work in public vocational education and training organisations, 19 % are from private training organisations, only 5.5 % from social and/or voluntary bodies and 6.9 % from private non-training firms.

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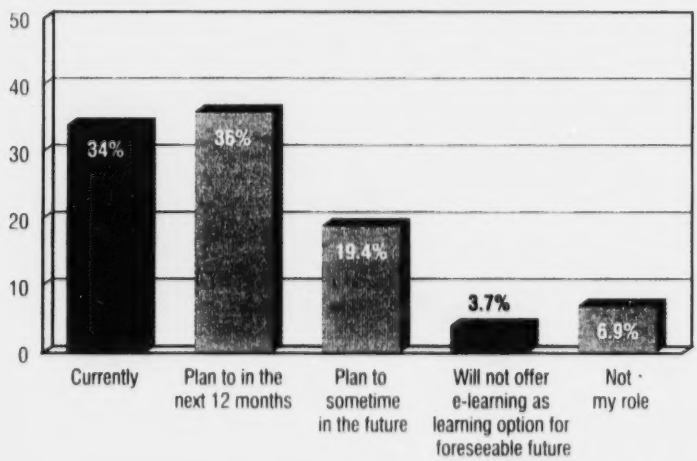
Of the 16 % 'other' respondents, the largest group come from higher education and/or research, and the next single largest group are policy-makers (Figure 31).

Over 29 % of total respondents work in policy or planning initiatives for adult basic skills and almost 20 % teach or train adult basic skills learners. 16.2 % are developing the skills of teachers and trainers working with adult basic skills learners and 14 % are designing e-learning tools and content for learners.

Of the 'other' 21 %, at least half of these work in teaching, training or administration and support of vocational education and training and provide some services to adult basic skills learners.

5.2. How much e-learning is being integrated into adult basic skills development?

Figure 32: Are you using e-learning methods and content with adult basic skills learners?



Some 34 % of those providing adult basic skills provision as dedicated basic skills development, or as part of other learning activities, are currently using e-learning technologies; another 36 % say they plan to within next 12 months. This means nearly 70 % of those working in the field utilising technologies by end of 2001. There is little difference between the public and private sectors A further 19.4 % of those actively involved in adult basic skills say they plan to use e-learning methods and content sometime in the future. Only 3.7 % said they would not offer e-learning at all as a learning option for the foreseeable future (Figure 32).

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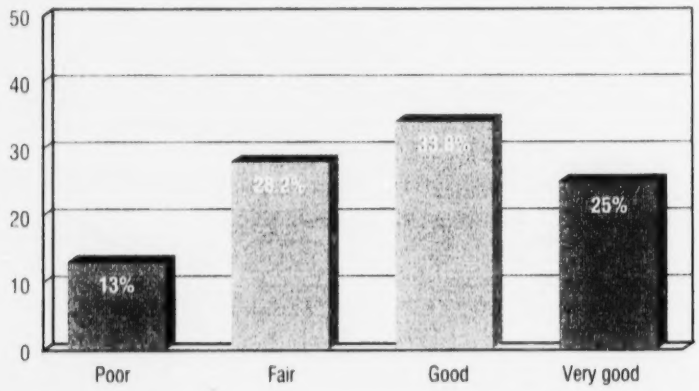
Those responsible for training teachers and trainers have a similar percentage (30 %) currently using e-learning but for those that are not, the timescale is somewhat later than other categories; in other words, they are less likely to adopt e-learning in the next 12 months but do plan to adopt it sometime in the future. This has some worrying implications, given that teacher and trainer skills are considered to be one of the most important issues to be addressed.

5.3. What are the challenges for adult basic skills teachers?

The challenge is no longer primarily about having hardware and Internet access for learners and teachers and trainers – it is about skills and provision of services to develop teacher and trainer skills. Internet access among all respondents appears pretty good with nearly 60 % saying it is good or very good and only 13 % describe it as poor (Figure 33). The private sector provision is slightly better off with 65 % saying Internet access is good or very good as against 53 % in public training bodies. Organisations responsible for teacher and trainer training appear to have a slightly worse position, with 20 % describing access to the Internet as poor and only 53 % describing it as good or very good.

Figure 33: Access to the Internet



Basic skills teachers' and trainers' access to hardware such as a convenient laptop or PC for working is also not a major barrier; an overall 63 % (58 % in public education and training organisations, 71 % in private) said this was good or very good and only 10 % described it as poor. Interestingly, those developing policy or planning initiatives had a higher access level to hardware (66 % good or very good) than either practitioners or teacher trainers, both at 59 %.

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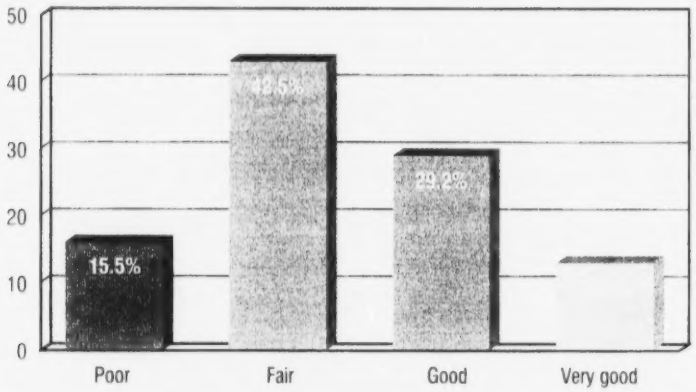
Figure 34: Teacher/trainer technology skills



However, technology skills among teachers and trainers are less well rated (as we know from earlier surveys - see survey report on trainers' skills for e-learning). 42 % of all respondents (40 % public, 45 % private) rated these skills good or very good, 42.5 % consider them fair and 15.5 % poor. Overall, in excess of 55 % say access to resources and expertise to help basic skills teachers and trainers develop technology skills is poor or fair (Figure 34).

A striking difference between the public and private sectors is that 15 % of private sector respondents believe their access to resources and expertise to develop technology skills is very good whereas only 5 % of respondents from the public sector believe so. Surprisingly, 50 % of basic skills teacher and trainer respondents rate teacher and trainer access to resources to develop their technology skills as good or very good, compared to only 44 % of planners/policy respondents and 41 % of those responsible for teacher training. This may imply that teachers and trainers are accessing resources on the ground, as they need them (perhaps on their own individual initiative), whereas trainer training organisations are not able to access them to the same level - as organisations rather than individuals.

When adult basic skills teachers and trainers were asked to evaluate their own pedagogical skills, a majority (82 %) considered them good or very good. When all respondents were asked the same question about adult basic skills teachers and trainers with whom they worked, a slightly different picture emerges at 72 %. Respondents responsible for teacher and trainer training were much less positive and rated them at 59 %. Further, when all respondents were asked how they rated basic skills teachers' capacity to adapt and innovate pedagogies in e-learning environments, nearly two thirds considered these to be poor or only fair. This has implications for teacher and trainer training and casts an

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interesting light on the optimism voiced on the expectations for pedagogical innovation through e-learning.

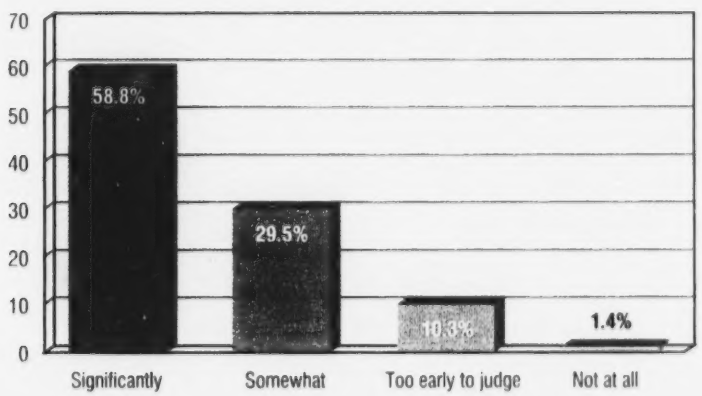
Overall, the e-learning skills of basic skills teachers and trainers were judged to be rather less than good (29.3 % poor, 45.4 % fair, 22.7 % good and 2.6 % very good). This obviously presents a great challenge to teachers and trainers in upgrading and enhancing their own skills and also for policy-makers and providers of teacher training.

5.4. The impact of e-learning on adult basic skills provision

Respondents offered a very positive view about e-learning and basic skills both in terms of improved teaching and in enhancing the opportunities and experience for learners.

Some 34.5 % of respondents believe e-learning will significantly improve and 36.5 % believe it will somewhat improve basic skills acquisition among adult learners. This means that over 70 % of respondents see e-learning as having a definite positive impact on learning among basic skills learners. Some 85 % stated that they believed it would have some impact on learner motivation of which 47.4 % stated that they believed the effect would be significant.

Figure 35: Do you believe e-learning will provide flexibility for diverse learner needs?



Some 85 % of respondents also said they felt e-learning would result in innovation and improvements in pedagogy for adult basic skills provision, almost 37 % 'significantly'. Further, 58.8 % said they believed e-learning would significantly offer flexibility for diverse learner needs (Figure 35). Overall, nearly 90 %

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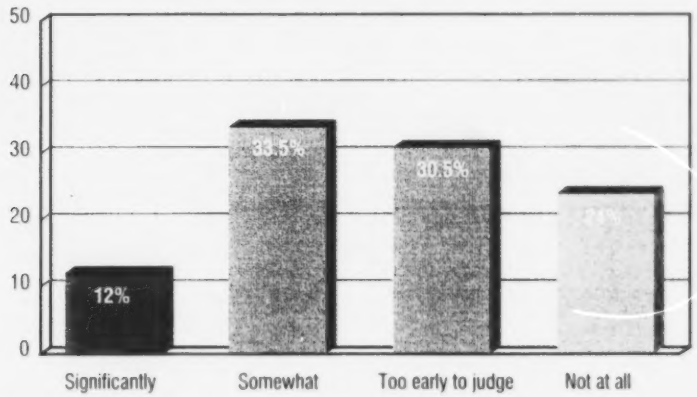
believe e-learning can offer positive opportunities for supporting the diversity of learner needs. Policy-makers and planners showed a higher level of optimism than teachers and trainers with an average higher rating of over 7 % on each of the above questions.

Access to support and resources through e-learning is not considered by most to be a significant problem - only 7 % stated that it might be a significant problem and 32 % felt it might be somewhat of a problem. 32.4 % felt it was too early to judge and 28.5 % considered it not at all to be a problem. Similarly, 24 % stated that they did not consider there to be any likelihood of reduced personal attention to learners while 30.5 % felt it was too early to judge. Only 12 % felt there might be a significant reduction in attention given to learners (Figure 36).

Figure 36: Do you believe that e-learning will reduce personal attention given to adult basic skills learners?



In addition, 33 % of respondents felt teachers would have no difficulty at all supporting basic skills learners using e-learning technologies. 28 % said they felt it might make it somewhat more difficult but only 8 % said they felt it might make it significantly more difficult to support learners' needs. Some 30 % said it was too early to judge.

Overall, more respondents are either positive or prepared to wait to judge than negative about the impact of technology on teachers' and trainers' capacity to support basic skills learners.

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5.5. Summary

In summary, a number of potentially important issues around e-learning and adult basic skills emerge from this survey. The high level of optimism is encouraging both in terms of adult learners' acquisition of basic skills through e-learning and in terms of the impact of e-learning on the provision of and potential for innovation in adult basic skills teaching.

Access to hardware and the Internet remains an issue but is no longer the main concern. Teachers' and trainers' technology skills and their capacity to use the technology to innovate pedagogically is of much greater concern. This highlights the increased perception of a need for much more teachers and trainers training in this domain. The lower levels or resources and lower levels of optimism expressed by those responsible for teacher and trainer training compared to the higher levels of resources and optimism expressed by policy-makers and planners suggest that there is a bottleneck in servicing teacher and trainer training needs. Achieving the potential expressed overall in such positive terms will depend on the capacity of the training systems to respond to these teacher and trainer training needs.

6. E-learning for people with disabilities

6.1. Who responded?

Over 320 people responded to this survey, demonstrating significant interest among training professionals in this important aspect of the debate on the digital divide and the opportunities offered by new technologies to widen access to learning. The survey was conducted in June 2001.

Some 81.7 % of replies came from within the EU, with a further 7.4 % from other European countries. Both North America and Australia/New Zealand each provide 4.5 % of respondents. Approximately a quarter of respondents say they belong to a network, although only about 15 % of these appear to be networks linked by a common interest in training for people with disabilities.

The largest group of respondents is from the public sector. It includes training professionals in public training organisations (28.8 %) and training professionals in other (non-training) public companies (3.9 %). An examination of the job descriptions of the 'other' group, suggests a further 7 % of all respondents work in public sector organisations in various training related activities. Together with the group 'administrators or policy-makers in the training domain' (8.2 %), most of which are likely to be in the public sector, it can be calculated that about half the respondents come from the public sector.

Private sector responses comprise 18.3 % training professionals in training organisations, 4.9 % training professionals in non-training organisations. Together with the 7 % whose job descriptions suggest they are employed in the private sector, responses from the private sector total 30.2 %.

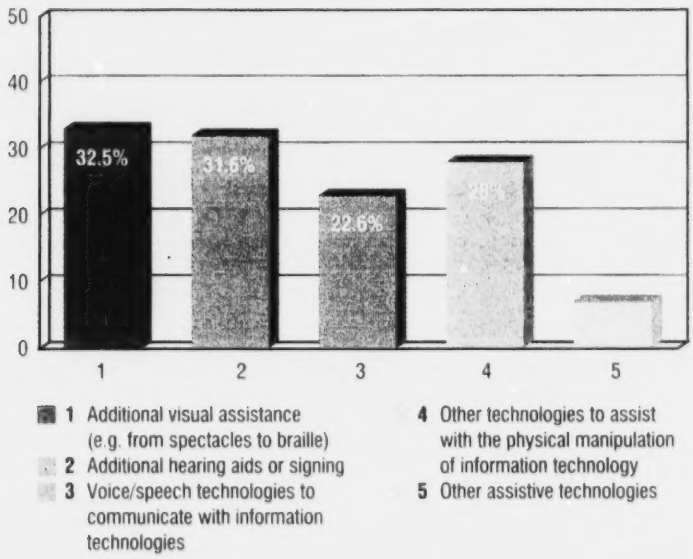
Approximately 17 % of all respondents work in the disability field. Some 5 % of all respondents are professionals providing dedicated training services to people with disabilities. A further 4.6 % are administrators or policy-makers and another 3.3 % are researchers working in services to people with disabilities. The remaining 4.6 % comes from those in the 'other' category who describe their work specifically as supporting people with disabilities.

6.2. Types of disability

The term 'disability' covers a wide range of people with different access needs. Respondents were asked to give a picture of the main access issues facing their learners with disabilities.

When asked to indicate the nature of the disability facing their learners, it is evident that many work with learners with multiple disabilities. 28.6 % cited hearing, 27.7 % vision, 17.5 % voice, 30.4 % learning, 33.1 % physical and 15 % 'other'. About half of the 'other' category can be included under the above headings (hearing, vision, etc.) – the remainder includes mental illness, psychiatric problems, brain injury, and behavioral difficulties.

Figure 37: Learners' requirements



The highest number 32.5 % say their learners require additional visual assistance (from spectacles to Braille). A similar number 31.6 % require additional hearing aids or signing. As these two groups comprise two thirds of the community with disabilities, it suggests that even simple responses, such as being able to switch between text and sound, could increase accessibility for the majority of users of e-learning services among users who responded.

Some 22.6 % require voice or speech technologies to communicate with information technology and 28 % require other technologies to assist with the physical manipulation of information. Of the small percentage who specified

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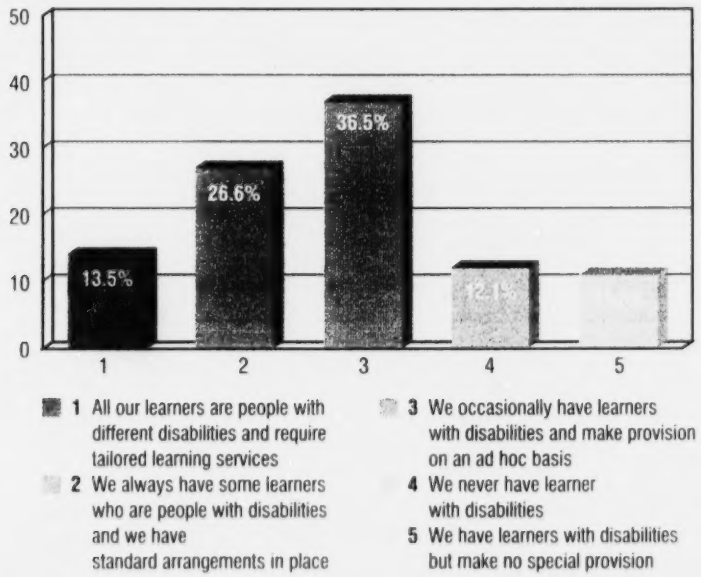
their needs most fall into the above categories. However, around 3 % say they are seeking ways of improving access for those with learning difficulties, notably dyslexia (Figure 37).

6.3. Provision for learners with disabilities

Figure 38: Organisations' provision for learners with disabilities


50
40
30
20
10
0
13.5%
26.6%
36.5%
1
2
3
4
5
1 All our learners are people with different disabilities and require tailored learning services
2 We always have some learners who are people with disabilities and we have standard arrangements in place
3 We occasionally have learners with disabilities and make provision on an ad hoc basis
4 We never have learner with disabilities
5 We have learners with disabilities but make no special provision

Some 13.5 % say that all their learners have some disability for whom they provide tailored learning services. Over half of respondents make provision for learners with disabilities either on a standard basis (26.6 %) or under ad hoc arrangements (36.5 %). Only 23 % say they either never have learners with disabilities or if they do, never make special provision. Overall, this suggests providers of e-learning services should take into account that many training providers make specific provision for learners with disabilities. Consequently, they should examine the feasibility of making their services fully accessible to ensure that the optimum number of learners will be captured (Figure 38).

The majority of training providers seem to make specific provision for learners with disabilities.

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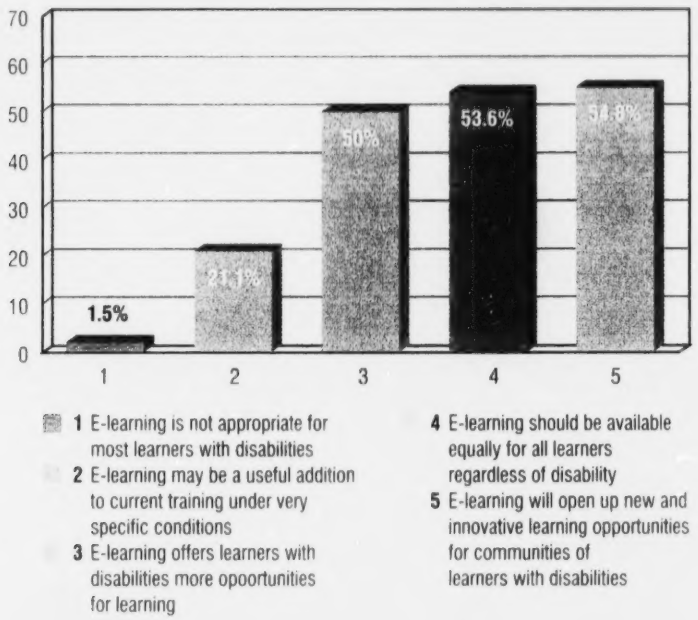
6.4. How important is e-learning for learners with disabilities?

Figure 39: How important is e-learning for learners with disabilities?



When respondents were asked to give their views on e-learning for learners with disabilities, based on their agreement with certain statements, the following picture emerges (Figure 39). Only 1.5 % agree 'e-learning is not appropriate for most learners with disabilities'. On the contrary, 50 % agree e-learning offers learners with disabilities more opportunities for learning, and 53.6 % support the statement that e-learning should be available equally for all learners regardless of disability. Further, 54.8 % agree e-learning will open up new and innovative learning opportunities for communities of learners with disabilities. It is clear, therefore, that there is a majority in favour of the use of e-learning for all learners and that e-learning is seen as a positive means to improve learning opportunities for learners with disabilities.

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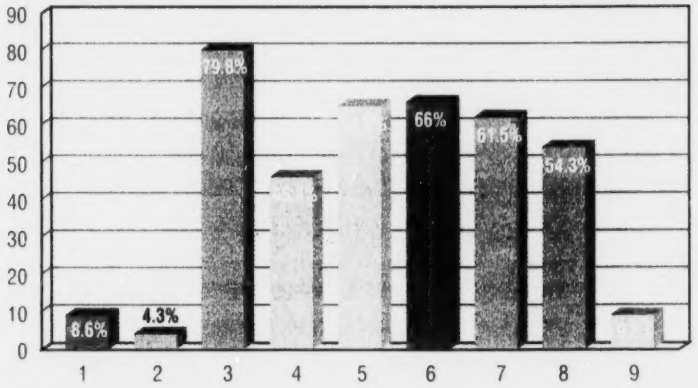
Figure 40: Adopting e-learning for learners with disabilities



1 E-learning will not be offered to most learners with disabilities because it will be too costly
2 E-learning will not be provided to learners with disabilities because it is unlikely that there will be much demand in the near future
3 E-learning for learners with disabilities should be provided to improve equality of access
4 E-learning for learners with disabilities is suitable for learners with sight disabilities
5 E-learning is suitable for learners with speech disabilities
6 E-learning is suitable for learners with hearing disabilities
7 E-learning is suitable for learners with motion disabilities
8 E-learning is suitable for learners with learning disabilities
9 E-learning will not be provided to most learners with disabilities because the technology is still not good enough to change the current methods and approaches

There is overwhelming support for adopting e-learning for learners with disabilities. Some 79.8 % believe e-learning should be provided to learners with disabilities to improve equality of access to learning. Between 45 % and 66 % of all respondents consider e-learning suitable for learners with sight, hearing, speech, motion and learning disabilities. Interestingly, the highest support is for learners with hearing disabilities and the lowest 45.8 % for those with sight difficulties (Figure 40). Given the many apparently 'able' adults with mild but ongoing diminishing sight due to ageing, this suggests most respondents are not yet including mature learners in their considerations.

It also suggests most respondents see current learning technology provision as largely screen-based text for reading rather than as a set of interactive multimedia services.

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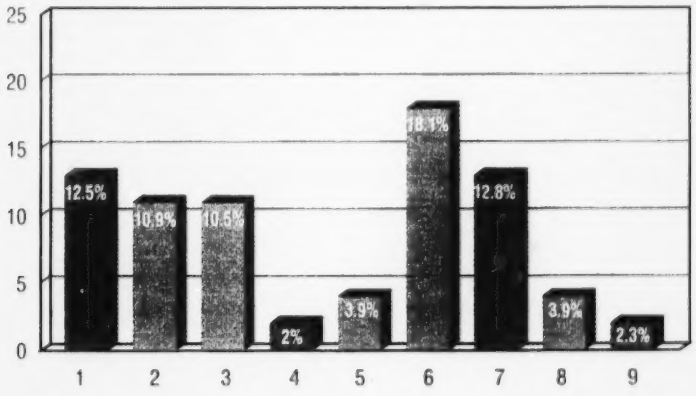
6.5. Awareness of 'state of the art' knowledge on e-learning for people with disabilities

When asked about their awareness of research and practice relating to e-learning and learners with disabilities, almost 10 % say they are very familiar with the current state of knowledge and it is a priority for their organisation. Some 23 % say they are investigating research and practice. Thus, despite the very positive attitudes expressed, only about a third of respondents are actually doing something about it. Another 33 % say they are aware of some work in the field, but it is not a main interest at present. A further 26 % say they are working in mainstream education and training and discussions about e-learning have not included specific provision for learners with disabilities so far. Only 8.9 % say the issue would be of no interest to them or their organisation in the next 12 to 24 months.

6.6. Policies and arrangements to support e-learning for learners with disabilities

Figure 41: Awareness of specific e-learning policies



A majority state they are unaware of any specific policies in their own countries (Figure 41). 12.9 % say they have specific policies in their own organisations and 24.8 % say such policies exist in their own countries.

When asked about awareness of specific policy documents/guidelines publicly available at a European/global level, no more than 18.7 % were aware of any documents.

6.7. Conclusions

Ensuring accessibility for all citizens and customers to rich new learning opportunities is a priority in public policy in every country around the world. The results suggest the majority of training professionals not only support this aspiration but view it as a realistic and viable aim. However, only a minority appear to be actually doing something about it by making themselves aware of the current state of research and practice.

Although the majority of respondents were very positive about the potential benefits of e-learning for people with disabilities, only about a third are actively developing an understanding and awareness of current research and practice. Less than 18 % of respondents were aware of any of the major global reports or guidelines on accessibility.

7. Training of trainers and teachers

7.1. Introduction

This survey was carried out between September and November 2001. It was completed by 446 respondents. This report highlights some of the main findings and aims to present a snapshot of how trainers and vocational teachers are acquiring new expertise in e-learning, what training and professional development they are undertaking, whether it is taking place in work time or their own time, if it's through formal or informal learning and who is bearing the cost of the investment. This survey follows that on *Trainers' skills for e-learning* carried out in October 2000 (see chapter 3).

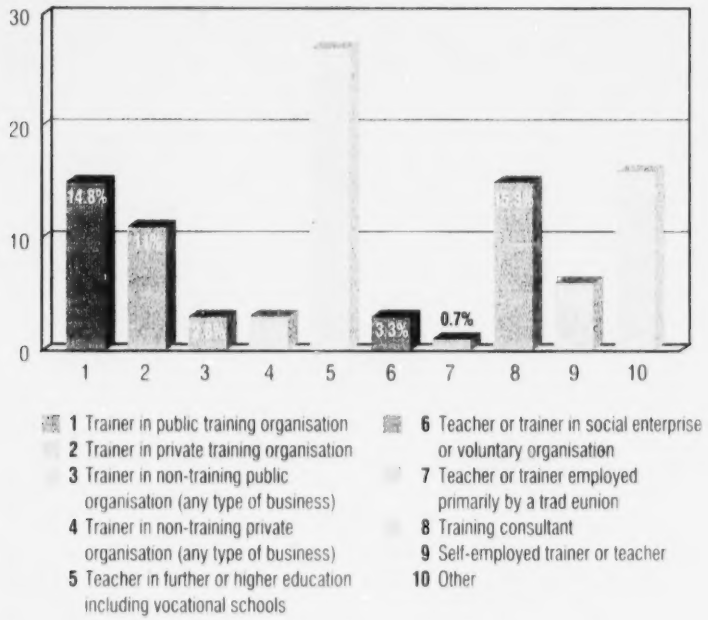
7.2. Who responded?

Almost 80 % of the respondents came from within the EU and a further 7.9 % came from other European countries. Almost 5 % came from North America and 3.8 % came from Australia and New Zealand.

Over 45 % came from public training organisations, vocational schools or higher and further education. In the private training sector, 14.1 % are employed in private firms, together with a further 15.3 % who are training consultants, and 5.9 % are independent teachers and trainers. Of the 15.7 % that list themselves as 'other', most are also directly involved in training (Figure 42).

When asked to give their personal earnings from teaching and training, 16.3 % earn more than EUR 50 000 (of which a quarter of them earn more than EUR 75 000). There are some differences in earnings some of which may be a surprise to readers. Earnings over EUR 50 000 are 11 % of those employed in public training organisations, 17 % of consultants and 19 % of those in higher, and institutes of further education and vocational training.

Figure 42: What is your main employment?


30
20
10
0
14.8%
3.3%
0.7%
1 2 3 4 5 6 7 8 9 10
1 Trainer in public training organisation
2 Trainer in private training organisation
3 Trainer in non-training public organisation (any type of business)
4 Trainer in non-training private organisation (any type of business)
5 Teacher in further or higher education including vocational schools
6 Teacher or trainer in social enterprise or voluntary organisation
7 Teacher or trainer employed primarily by a trad eunion
8 Training consultant
9 Self-employed trainer or teacher
10 Other

Some 30 % earn between EUR 30 000 and 50 000 and with the exception of self-employed, teachers and trainers at 16 %, this is similar across respondents from all types of organisations. Over 25 % of all respondents earn less than EUR 10 000, this rises to 35 % among those employed in private training firms and 36 % of self-employed teachers and trainers.

7.3. Professional development in relation to e-learning

Majority of respondents use informal means of professional development to improve their e-learning expertise Some 60 % have undertaken informal self-development through a range of media. Informal learning tends to be highest among respondents from non-training public sector organisations and consultants. Some 30.5 % have had formal classroom-based training, this is lowest among consultants and self-employed teachers and trainers. 18.6 % have undertaken formal web-based training programmes (much lower among respondents from public training organisations) and 16.4 % have undertaken some form of hybrid (web and classroom) or blended formal training. This is slightly lower among respondents from public training organisations and those

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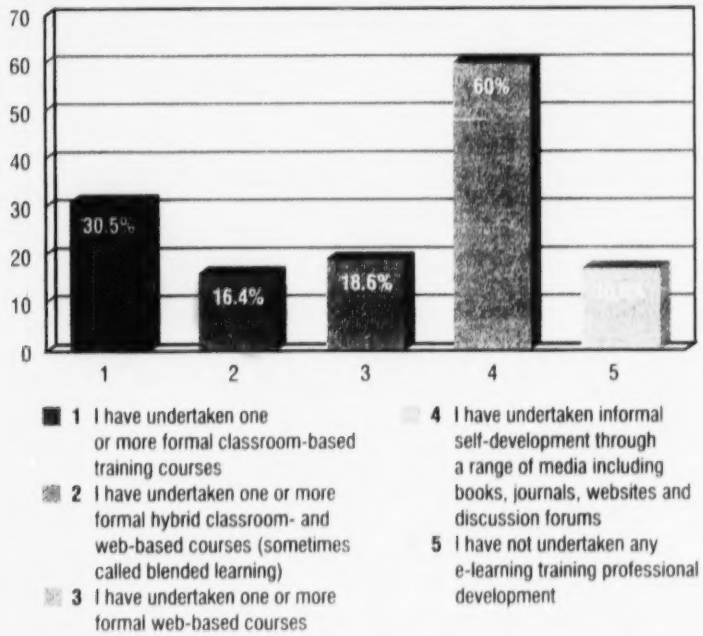
from public non-training organisations, and generally lower among consultants and respondents from higher and further education (Figure 43).

Figure 43: What training and/or professional development relating to e-learning have you undertaken in the last 12-24 months?



Some 16.6 % said they had not undertaken any professional development in relation to e-learning in the last 12 to 24 months and gave a variety of reasons. Some 20 % of respondents from private non-training organisations said they had no professional development in relation to e-learning as did 19 % of those employed in public training organisations. The most common reasons for not undertaking any professional development were lack of time or funds.

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Figure 44: What subject domain was the main focus of your e-learning professional development in 2000?

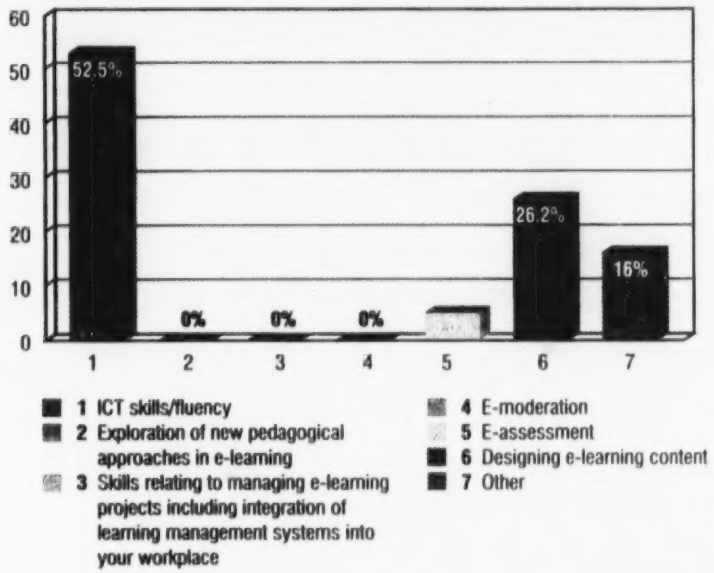
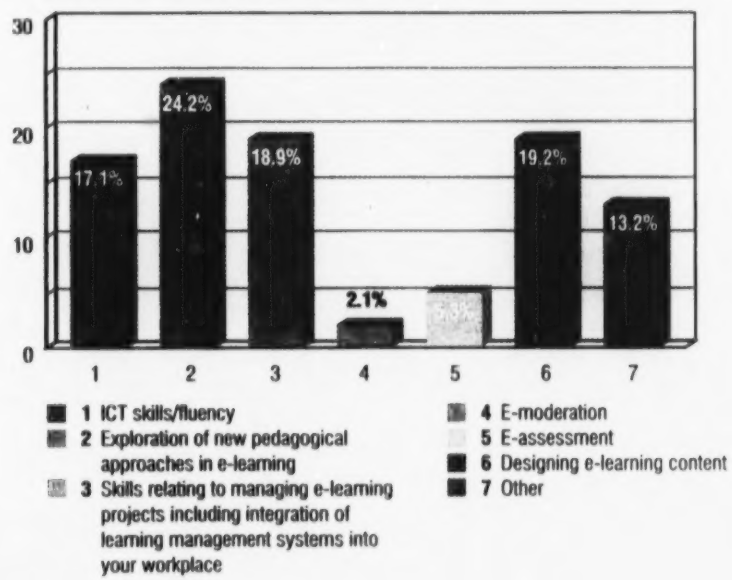


Figure 45: What subject domain was the main focus of your e-learning professional development in 2001?



Trainers and vocational teachers are undertaking less information and communication technology skills development and moving into improving expertise in pedagogical and management issues in relation to e-learning.

Over half the respondents had training in information and communication technology skills in 2000 (Figure 44) but this had dropped significantly in 2001 to just over 17 % indicating a move away to other areas of competence. This finding is common across all types of respondents. This move away from information and communication technology skills is supported by the fact that exploration of new pedagogical approaches in e-learning increased from 0 % in 2000 to 24.2 % in 2001 and skills relating to managing e-learning projects including integration of learning management systems into your workplace from 0 % in 2000 to 18.9 % in 2001 (Figure 45).

Some interesting differences emerge here in terms of employment characteristics and learning preferences. Pedagogical interests are much lower among private training companies and trainers in private non-training organisations. On the other hand, training in developing 'skills relating to management' are much lower among public training providers, colleges of further and higher education and self-employed teachers and trainers. Overall, however, the results suggest a maturing of expertise as trainers and vocational teachers recognise that being able to use the technology is only a first step towards integrating technology in learning.

Interestingly, the proportion of those spending time on learning how to design e-learning content is quite high – 26.2 % in 2000 although this drops to 19.2 % in 2001. Very few (2.1 % in 2001) are undertaking skills development for e-moderation in spite of emphasis placed on these skills in the previous survey on *Trainers' skills for e-learning*. About 5 % in both years have been learning about e-assessment.

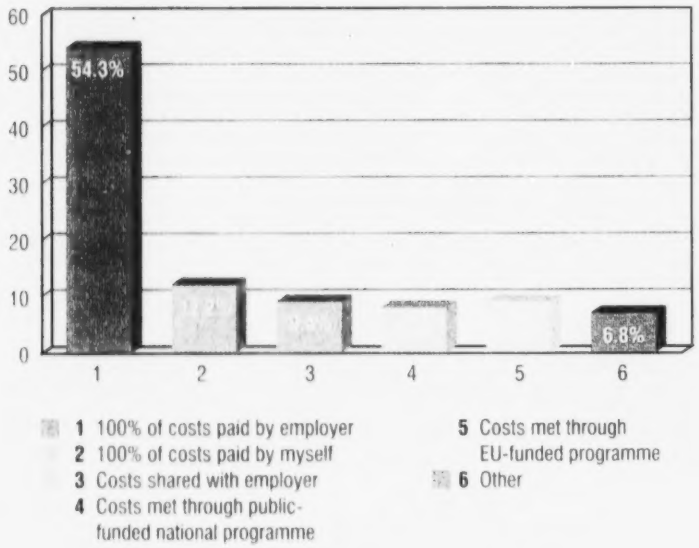
Ratings concerning the quality of training and professional development programmes are generally low. Some 21 % rate them poor, 45 % only fair and only 7 % give a very good and 1 % give an excellent rating based on their experiences. Highest dissatisfaction is among public sector respondents and consultants. The overall low ratings may be attributable to the fact that teacher and trainer training programmes in this domain are very immature and often somewhat experimental.

Irrespective of the amount of professional development time spent on e-learning, more of it was informal than formal in 2000. This remains the case in 2001.

Over 36 % spend between 1 to 4 % of their work time in professional development relating to e-learning in 2001, a slight decrease from 2000. Some 16.6 % spent 5 to 10 % of work time on professional development relating to e-learning in 2000, with 19.6 % doing so in 2001.

Some 25.7 % spent 5 to 10 % of their professional development time outside work hours on e-learning in 2000, dropping to 21.2 % in 2001. Interestingly, demonstrating perhaps early adopters and leaders, just over 10 % in both 2000 and 2001 spent more than 25 % of their informal professional development time on e-learning. In fact, respondents overall spend a higher percentage of their professional development time outside work on e-learning than they do in work time.

Figure 46: Who has paid for your professional development in e-learning in 2000 and 2001?



As might be expected, employers cover the costs of formal and informal professional development in work time much more than they do outside work time (Figure 46). It would be interesting to know the degree to which employers are aware of their contribution to informal professional development. Over half say their employers pay for 100 % of the costs for formal programmes in work time with a almost 10 % more sharing costs for these programmes with their employers. These formal at work programmes also have funding from national and EU programmes with funding for 8.3 % coming from national programmes and a further 9 % from EU-funded programmes.

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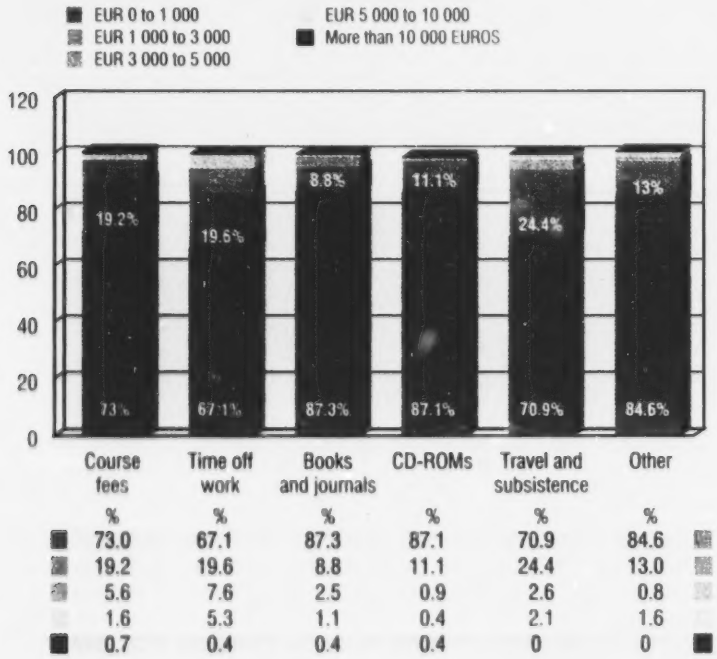
A higher percentage of respondents from the public sector (public training companies, public non-training companies and higher and further education) say they have 100 % of their costs covered by the employer than the private sector. Only 20 % of those taking formal programmes outside work time have these programmes funded by employers, although again over 10 % share costs. A higher percentage of respondents from private training companies say that for formal programmes outside work time, they have their costs paid for by their employer or at least shared with the employer.

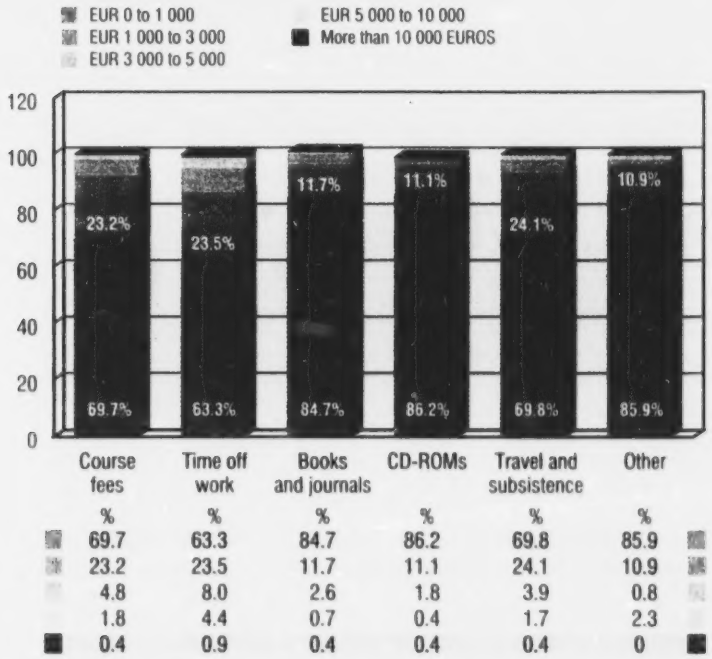
In the case of informal learning, 27 % of respondents pay for the full costs themselves even though they are doing so within work time (costs are likely to include resources such as books, CD-ROMs, etc. and non-accredited web programmes) with a further 15 % sharing the costs with employers. Informal programmes and activities outside work time are largely funded by learners themselves although about 18.3 % have their employers pay some or all of the costs associated with this professional development.

Figure 47: Estimate of the direct costs of your learning/professional development in e-learning in 2000



	Course fees	Time off work	Books and journals	CD-ROMs	Travel and subsistence	Other
	%	%	%	%	%	%
■	73.0	67.1	87.3	87.1	70.9	84.6
■	19.2	19.6	8.8	11.1	24.4	13.0
■	5.6	7.6	2.5	0.9	2.6	0.8
	1.6	5.3	1.1	0.4	2.1	1.6
■	0.7	0.4	0.4	0.4	0	0

Figure 48: Estimate of the direct costs of your learning/professional development in e-learning for 2001



	Course fees	Time off work	Books and journals	CD-ROMs	Travel and subsistence	Other
	%	%	%	%	%	%
	69.7	63.3	84.7	86.2	69.8	85.9
	23.2	23.5	11.7	11.1	24.1	10.9
	4.8	8.0	2.6	1.8	3.9	0.8
	1.8	4.4	0.7	0.4	1.7	2.3
	0.4	0.9	0.4	0.4	0.4	0

In 2000, the majority (73 %) spent less than EUR 1 000 on e-learning related course fees, and a further 19.2 % spent between EUR 1 000 and EUR 3 000 (Figure 47). There was a small shift in 2001, with just under 70 % spending less than EUR 1 000 and more than 23 % spending EUR 1 000 to EUR 3 000 (Figure 48).

Books remain hugely important in e-learning professional development. Over 87 % spent up to EUR 1 000 in 2001, with a 3 % drop in 2001. Spending between EUR 1 000 and EUR 3 000 on books went from 8.8 % in 2000 to 11.7 % in 2001. CD-ROMs remained very significant with very similar spending patterns to books in both years.

Travel and subsistence cost up to EUR 1 000 for about 70 % of respondents for both years and about 24 % spent between EUR 1 000 to EUR 3 000 again in both years. There was a slight rise in those spending in excess of EUR 3 000 in 2001. This suggests that vocational teachers and trainers are still travelling to attend courses, seminars and professional development events and the majority still attend in person rather than log-on to online programmes.

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With regard to cost of the time away from work, 67 % of respondents estimated it to be less than EUR 1 000 per annum (suggesting that most personal development programmes are relatively local), almost 20 % said it cost between EUR 1 000 to EUR 3 000 and 7.6 % between EUR 3 000 to EUR 5 000 in 2000. In 2001, this cost increased slightly (perhaps reflecting the need for more advanced and less available local programmes?) with almost 24 % estimating a cost of EUR 1 000 to EUR 3 000 for time off work.

Adding all costs together, a majority of respondents spend up to EUR 6 000 a year on professional development relating to e-learning and between 10-20 % considerably more. The costs associated with professional development appear to be rising but in spite of that, the vast majority will spend more rather than less time on e-learning professional development in the future.

7.4. Future

The vast majority of respondents anticipate spending more rather than less time on e-learning professional development in the future. Many see it as a necessity because:

- 'it will be the basic factor of the competitive edge in the very near future',
- 'there is a clear learning need established',
- 'customers ask for it',
- 'the amount of e-learning materials for our members will increase enormously in the next five years',
- 'it is the new era of learning. We have to develop flexible education for everyone in the EU',
- 'I cannot do my work without learning',
- 'e-learning is an essential part in the mixture of present and future learning tools'.

7.5. Commentary

The most remarkable finding is the move away from the emphasis on information and communication technology skills to pedagogical and management skills. This is encouraging and reflects the awareness evident in the 2000 survey on *Trainers' skills for e-learning* that e-learning expertise among vocational teachers and trainers will be much more than simply being able to manipulate the technology. Also interesting is the difference between the public and private sectors on the emphasis they place on new skills and knowledge – pedagogical and managerial.

Of most concern is that current offers are rated so poorly. There is an obvious need to improve the quality of formal and informal professional development programmes and resources.

8. Questionnaires

8.1. Technology-supported learning (TSL)

8.1.1. **About you**

Please provide us with your name and e-mail address (optional)

Name:
E-mail:
Position:

How would you describe your primary role? (please select only one)

- ❑ Training administrator in public sector
- ❑ Teacher in school or university
- ❑ Trainer in company
- ❑ Researcher
- ❑ Trainer in public sector
- ❑ Training or human resources manager in company
- ❑ Training programme designer
- ❑ Other (please specify)

8.1.2. **Your experience of technology-supported learning**

Which of the following technologies have you used as either a learner, trainer or training administrator?
(Please choose all the relevant technologies)

- ❑ CD-ROM/DVD
- ❑ WWW
- ❑ E-mail
- ❑ Dedicated learning environment, e.g. Lotus learning Space, TopClass
- ❑ Virtual reality
- ❑ Other (please specify)

Which of the following describes your experience with technology-supported learning best?

- ❑ I have experienced technology-supported learning mainly as a learner
- ❑ I have experienced technology-supported learning mainly as a teacher/trainer
- ❑ I have experienced technology-supported learning mainly as a training administrator
- ❑ My primary role is as a designer/developer of technology-supported learning

As a learner, what percentage of your learning is currently supported by technology?

- ❑ None
- ❑ 0-10 %
- ❑ 10-25 %
- ❑ 25-50 %
- ❑ Over 50 %
- ❑ All of it

In 12 months time, how much of your learning will be supported by technology?

- ❑ None
- ❑ 0-10 %
- ❑ 10-25 %
- ❑ 25-50 %
- ❑ More than 50 %
- ❑ All of it

As a trainer or administrator, what percentage of your teaching is currently supported by technology?

- ❑ None
- ❑ 0-10 %
- ❑ 10-25 %
- ❑ 25-50 %
- ❑ Over 50 %
- ❑ All of it

In 12 months time, how much of the training for which you are responsible will be supported by technology?

- ❑ None
- ❑ 0-10 %
- ❑ 10-25 %
- ❑ 25-50 %
- ❑ More than 50%
- ❑ All of it

B13 Sources of technology-supported learning

Where do you source most of your training/learning content? (Please select only one)

- ❑ I design it myself
- ❑ I commission content from professional designers
- ❑ I buy content already developed and support it myself
- ❑ I buy content and support from education and training organisations
- ❑ Other (please specify)

Your interests for the future

Please provide a short list of the subject or occupational areas for which you would like to obtain technology-supported learning products and services, e.g. subjects such as electronics, quality assurance, network management, language learning.

Please indicate which of the following is of interest to you (choose all the relevant points)

- ❑ Information about technology-supported learning products and services
- ❑ Reviews of technology-supported learning products and services
- ❑ News about new technology in education and training
- ❑ Research into pedagogy, effectiveness of technology-supported learning, etc.
- ❑ Discussion area for professional debate and exchange
- ❑ Case studies of technology-supported learning in action
- ❑ Information on technologies and tools
- ❑ Other (please specify)

8.2. E-mail in e-learning

8.2.1. **Trainer to learner**

Please complete this section if you are a trainer and use e-mail to support learners (* Obligatory field).

Please provide us with your name and e-mail address (optional)

Name:

E-mail:

*Do you use e-mail for any of the following? **

- ❑ Sending instructions to learners
- ❑ Sending assignments to learners
- ❑ Sending assignments to learners
- ❑ Surveying learner views
- ❑ Respond to training offers
- ❑ Providing advice to learners
- ❑ Generating discussion among learners
- ❑ Request information from other training suppliers
- ❑ Other

*Working with other professionals, do you use e-mail to? **

- ❑ Discuss e-learning approaches
- ❑ Look for new products and services
- ❑ Build a community of practice
- ❑ Other

*Do you expect your learners to use e-mail to? **

- ❑ Support one another
- ❑ Undertake group assignments
- ❑ Share references
- ❑ Discuss assignments
- ❑ Share ideas
- ❑ Request training needs
- ❑ Other

*As a training provider, do you use e-mail to? **

- ❑ Market training products and services
- ❑ Test market new ideas
- ❑ Develop customer base thorough e-mail newsletters
- ❑ Survey training needs
- ❑ Disseminate training research
- ❑ Other

In your role as a professional trainer/mentor, do you use e-mail?

- ❑ To monitor learners
- ❑ To send messages to learners about assignments/tests
- ❑ To check if messages are read and responded to
- ❑ To assess learners
- ❑ As a means to confirm receipt of assignments on time
- ❑ Other

8.2.2. **Background information**

*Are you located in? **

(Please select only one)

- ❑ Company
- ❑ Education/training institute
- ❑ Other

Do you have a documented policy on the use of e-mail in your e-learning activities? (Please describe)

8.3. Trainer's skills for e-learning

8.3.1. **Your professional occupation**

*Are you? (please select only one) **

- ❑ Working in a public or third sector training organisation
- ❑ A trainer in a public or third sector organisation (i.e. the organisation is not a training organisation)
- ❑ Working in a private training organisation
- ❑ A trainer in a private enterprise (i.e. the enterprise is not a training supplier)
- ❑ Working in a university or college of higher and further education
- ❑ Other

8.3.2. **Skills and expertise**

*How do you rate your skills and expertise in e-learning in the following? * (Poor / Fair / Good / Very good / Excellent)*

- ❑ Your ability to write a technical specification for an e-learning environment (platform) and tools for design, delivery and evaluation (e.g. user needs analysis).
- ❑ Your ability to write a pedagogical specification for an e-learning environment, tools and content (e.g. pedagogical options description, assessment outcomes and process analysis etc.).
- ❑ Your ability to write a business specification for an e-learning environment (platform), tools and content.
- ❑ Your expertise in working in a cooperative virtual environment with your peers and in moderating learners.
- ❑ Your project management skills

*How important do you rate these skills for trainers? * (1 = essential, 5 = not important)*

- ❑ To be able to write a technical specification for an e-learning environment (platform) and tools for design, delivery and evaluation.
- ❑ To be able to write a pedagogical specification for an e-learning environment (platform), tools and content.
- ❑ To be able to prepare a business case for an e-learning environment (platform), tools and content.
- ❑ Project management expertise
- ❑ To be able to cooperate across professional, cultural and geographic boundaries
- ❑ To be able to moderate and stimulate groups of learners in a virtual workspace

8.3.3. **Acquisition of skills and expertise**

*How have you and your colleagues acquired these skills and expertise? **

- ❑ Formal education and training programme in e-learning
- ❑ Learned through participation in e-learning activities with others who have formal training in e-learning
- ❑ Learned through trial and error without formal expertise being provided
- ❑ Have not acquired any of these skills to date

When do you think the majority of training professionals will need to acquire the following skills and expertise?

	Now, immediately	Within the next 12-24 months	Within the next 5 years	I don't think the majority of trainers will need to acquire these skills
Advanced technical knowledge	❍	❍	❍	❍
New pedagogical expertise in designing and delivering e-learning	❍	❍	❍	❍
New business expertise to evaluate the benefits of e-learning on job performance	❍	❍	❍	❍
Cooperative working and learning expertise	❍	❍	❍	❍
Project management skills	❍	❍	❍	❍

As a training professional, what concerns you most about the use of technology in your work? Please add your comments about the skills and expertise you feel are the most important for you to have to support e-learning in your organisation.

8.4. Economics of e-learning

8.4.1. About your organisation

Are you? (please select only one) *

- ❑ A public training provider supplying e-learning as well as other forms of training
- ❑ Public e-learning provider
- ❑ A private training provider supplying e-learning as well as other forms of training
- ❑ Private e-learning provider
- ❑ University or college of further and higher education offering e-learning
- ❑ Information and communication technology firm providing technology and/or communications used for e-learning
- ❑ Other (please specify)

8.4.2 Your role in e-learning

Do you? (Always / Occasionally / Never)

- ❑ Develop e-learning content within your organisation?
- ❑ Outsource the development of e-learning content?
- ❑ Provide e-learning online support from within your organisation's staff?
- ❑ Outsource e-learning online support from external experts?
- ❑ Do you provide technical support and maintenance for your e-learning environment in-house?
- ❑ Do you outsource technical support and maintenance for your e-learning environment?

8.4.3 Costing e-learning

How do you calculate the cost of e-learning content?

- ❑ By comparison with the cost of classroom training
- ❑ Ratio of development time (hours) against learner hours
- ❑ Benchmark against cost of off the shelf e-learning content
- ❑ Other (please describe)

*How do you calculate the cost of e-learning support? **

- ❑ Per number of learners
- ❑ Related to the cost of classroom training
- ❑ Added to content cost as a global figure for a particular training objective
- ❑ Proportional relationship with the cost of content
- ❑ Other (please describe)

Do you expect the cost of e-learning content and support to change in the next two years?

	Expect it to rise	Expect it to stay the same	Expect it to fall	Don't know
Content	❍	❍	❍	❍
Support	❍	❍	❍	❍

8.4.4. **Your views**

What is your greatest concern related to the cost of developing or purchasing e-learning products and services?

8.5. E-learning and adult basic skills

8.5.1. **You and your organisation**

Do you work in (please select only one)? *

- ❑ A public sector vocational education and/or training organisation?
- ❑ A private training organisation
- ❑ A voluntary/third sector/social enterprise
- ❑ A private (non-training) organisation
- ❑ Other (please specify)

Are you? *

- ❑ Teaching/training adult basic skills learners
- ❑ Developing policy and/or planning initiatives for basic skills provision for adults
- ❑ Developing the skills of teachers and trainers working with basic skills learners
- ❑ Designing e-learning tools and content for adult basic skills learners

8.5.2. **Current and planned activity**

Are you using e-learning methods and content with adult basic skills learners (either as dedicated basic skills development or as part of other learning activities)? *

- ❑ Currently
- ❑ Plan to in the next 12 months
- ❑ Plan to sometime in the future
- ❑ Will not offer e-learning as learning option for foreseeable future
- ❑ Not my role

8.5.3. **Your views**

*How would you rate the following for basic skills teachers/trainers **
(Poor / Fair / Good / Very good)

- ❑ Access to the Internet
- ❑ Access to a convenient PC or laptop for working
- ❑ Teacher/trainer technology skills
- ❑ Access to resources and expertise to assist teachers/trainers develop technology skills

*How would you rate the following? **
(Poor / Fair / Good / Very good / Not applicable)

- ❑ Your pedagogical skills as a trainer/teacher of adult basic skills learners
- ❑ The pedagogical skills of teachers of basic skills with whom you work
- ❑ The expertise of basic skills teachers to adapt and innovate pedagogics in e-learning environments

*Overall, how would you rate the e-learning skills of basic skills teachers and trainers? **
(Poor / Fair / Good / Very good)

*Do you believe that e-learning will? **
(Significantly / Somewhat / Too early to judge / Not at all)

- ❑ Improve learning among adult basic skills learners
- ❑ Make it more difficult for basic skills learners to access the support and resources they need
- ❑ Increase learner motivation by offering an alternative to the classroom
- ❑ Reduce personal attention given to adult basic skills learners
- ❑ Result in improvements and innovation in pedagogy for adult basic skills provision
- ❑ Make it more difficult for teachers/trainers to support learners needs
- ❑ Provide flexibility for diverse learner needs

*What concerns or interests you most about e-learning and adult basic skills? **

8.6. E-learning for people with disabilities

Please note that some questions are directed at training professionals, some at administrators, researchers and policy-makers and some at all respondents.

8.6.1 Respondents profile

This section to be completed by all respondents

Please indicate your occupation

- ❑ Training professional working in a public training organisation
- ❑ Training professional working in a private training organisation
- ❑ Training professional working in a public (non-training) organisation
- ❑ Training professional working in a private (non-training) enterprise
- ❑ Training professional providing dedicated services to people with disabilities
- ❑ Researcher working in the field of training and/or e-learning
- ❑ Researcher working in the field of services for people with disabilities
- ❑ Administrator or policy-maker in the training domain
- ❑ Administrator or policy-maker in the domain of services for people with disabilities
- ❑ Other, please specify

Where are you located?

- ❑ European Union
- ❑ Other Europe
- ❑ North America
- ❑ Central/South America
- ❑ Africa
- ❑ Asia / Middle East
- ❑ Australia / New Zealand

Are you a member of a network? (If yes, please indicate which)

8.6.2. Training provision

This section to be completed by training professionals only.

Which of the following applies to your organisation?

- ❑ All our learners are people with different disabilities and require tailored learning services
- ❑ We always have some learners who are people with disabilities and we have standard arrangements in place
- ❑ We occasionally have learners with disabilities and make provision on an ad hoc basis
- ❑ We never have learners with disabilities
- ❑ We have learners with disabilities, but make no special provision

Do any of your learners require the following?

- ❑ Additional visual assistance (e.g. from spectacles to braille)
- ❑ Additional hearing aids or signing
- ❑ Voice/speech technologies to communicate with information technologies
- ❑ Other technologies to assist with the physical manipulation of information technology
- ❑ Other assistive technologies. Please describe

If you are working with learners with disabilities, please indicate the nature of the disability?

- ❑ Hearing
- ❑ Vision
- ❑ Voice
- ❑ Learning
- ❑ Physical manipulation
- ❑ Other. Please describe

8.6.3. **Current use of technologies in learning**
This section to be completed by training professionals only

E-learning provision in your organisation. How would you describe your current and planned implementation of e-learning?

	Currently	Planned for the next 12 months
Wholly an e-learning provider	❍	❍
E-learning is integral to our provision	❍	❍
E-learning is an occasional part of our provision	❍	❍
E-learning used for specific types of participants	❍	❍

8.6.4. **E-learning for learners with disabilities 1**
This section to be completed by training professionals and providers.

Which of the following statements do you agree with?

- ❑ E-learning is not appropriate for most learners with disabilities
- ❑ E-learning may be a useful addition to current training under very specific conditions
- ❑ E-learning offers learners with disabilities more opportunities for learning
- ❑ E-learning should be available equally for all learners regardless of disability
- ❑ E-learning will open up new and innovative learning opportunities for communities of disabled learners

8.6.5. **E-learning for learners with disabilities 2**
This section to be completed by policy-makers, researchers and training administrators.

Which of the following most accurately describes your current view?

- ❑ I am very familiar with research and/or practice in using e-learning for learners with disabilities as it is a priority for me/my organisation
- ❑ I am currently investigating research and practice regarding e-learning and learners with disabilities to provide this information to decision makers

- ❑ I am aware of some work undertaken using e-learning with learners with disabilities but it is not my/our main interest at present
- ❑ I am working in mainstream education and training and discussions about e-learning have not included specific provision for learners with disabilities so far
- ❑ It is unlikely that this issue will be of interest to me or my organisation in the next 12-24 months

Please provide information on any research and/or background documentation on experiences in providing e-learning for learners with disabilities, that you would recommend.

8.6.6. **E-learning for learners with disabilities 3**
To be completed by all respondents.

Which of the following statements do you agree with?
(Choose all those that apply)

- ❑ E-learning will not be offered to most learners with disabilities because it will be too costly
- ❑ E-learning will not be provided to learners with disabilities because it is unlikely that there will be much demand in the near future
- ❑ E-learning for learners with disabilities should be provided to improve equality of access
- ❑ E-learning for learners with disabilities is suitable for learners with sight disabilities
- ❑ E-learning is suitable for learners with speech disabilities
- ❑ E-learning is suitable for learners with hearing disabilities
- ❑ E-learning is suitable for learners with motion disabilities
- ❑ E-learning is suitable for learners with learning disabilities
- ❑ E-learning will not be provided for most learners with disabilities because the technology is still not good enough to change current methods and approaches

8.6.7 Improving accessibility

To be completed by all respondents.

Are you aware of specific policies to support the provision of e-learning to learners with disabilities?

- ❑ In your country
- ❑ In your organisation
- ❑ No

If 'yes' to the previous question, can you describe or reference these policies? (preferably with a URL)

Are you aware of the following?

- ❑ W3C techniques for web content accessibility guidelines 1.0 http://www.w3.org/TR/2000/NOTE-WCAG10-TECHS-20001106/
- ❑ IBM accessibility guidelines http://www-3.ibm.com/able/accessweb.html
- ❑ The Microsoft online hub about accessibility and assistive technology http://www.microsoft. com/enable/
- ❑ Section 508 of the US Federal Accessibility Initiative http://www.section508.gov/
- ❑ The publication, *The 2001 U.S. Market for Accessible e-Learning* http://www.Brandon-Hall.com
- ❑ Towards a barrier-free Europe for people with disabilities. Communication from the European Commission http://europa.eu.int/comm/employment_social/equ_opp/com284f/com_284f_en.pdf
- ❑ Bobby http://www.cast.org/bobby/
- ❑ 'Design for all ' commissioned by CEN /ISSS http://www.ict.etsi.fr/activities/Design_for_All/ICTSB%20Main%20Report%20.pdf
- ❑ Other guidelines (especially European), initiatives or publications. If so, please reference and if possible give URL.

8.6.8 Other comments

Would you like to add any other comments?

8.7. Training of trainers and teachers

8.7.1. Respondent's profile

What is your main employment? *

- ❑ A trainer in a public training organisation
- ❑ A trainer in a private training organisation
- ❑ A trainer in a non-training public organisation (any type of business)
- ❑ A trainer in a non-training private organisation (any type of business)
- ❑ A teacher in further or higher education including vocational schools
- ❑ A teacher or trainer in a social enterprise or voluntary organisation
- ❑ A teacher or trainer employed primarily by a trade union
- ❑ A training consultant
- ❑ A self-employed trainer or teacher
- ❑ Other, please specify

Where are you located? *

- ❑ Within the EU
- ❑ Non-EU European country
- ❑ North America
- ❑ Central or South America
- ❑ Africa
- ❑ Asia
- ❑ Australia or New Zealand

Your personal earnings from teaching and/or training

We are trying to relate earning levels to how much trainers and teachers invest in their own development and how much their employers contribute to their development. There will be no disclosure of any individual's data including this sensitive question. If you wish to convert the euro amount from your own currency, you can do so on http://www.xe.com/ucc/ *

My earnings from teaching/training are in the range:

- ❑ EUR 0 – 5 000
- ❑ EUR 5 000 – 10 000
- ❑ EUR 10 000 – 20 000
- ❑ EUR 20 000 – 30 000
- ❑ EUR 30 000 – 40 000
- ❑ EUR 40 000 - 50 000
- ❑ EUR 50 000 – 75 000
- ❑ EUR 75 000 – 100 000
- ❑ More than EUR 100 000

Gender *

- ❑ Male
- ❑ Female

8.7.2. **Your professional development**

What training and/or professional development relating to e-learning have you undertaken in the last 12-24 months? (Click all that apply)

- ❑ I have undertaken one or more formal classroom-based training course
- ❑ I have undertaken one or more formal hybrid classroom- and web-based course (sometimes called blended learning)
- ❑ I have undertaken one or more formal web-based course
- ❑ I have undertaken informal self-development through a range of media including books, journals, websites and discussion forums
- ❑ I have not undertaken any e-learning training or professional development (Please state why).

What subject domain was the main focus of your e-learning professional development? *

	In 2000	In 2001
Information and communication technology skills/fluency	❍	❍
Exploration of new pedagogical approaches in e-learning	❍	❍
Skills relating to managing e-learning projects including integration of learning management systems into your workplace	❍	❍
E-moderation	❍	❍
E-assessment	❍	❍
Designing e-learning content	❍	❍
Other	❍	❍

Based on your experience as a learner, how would you rate the quality of professional development programmes provided to teachers and trainers to improve their capacity to provide and support e-learning? *
(Poor / Fair / Good / Very Good / Excellent)

8.7.3. **Investment in your professional development**

What percentage of your time as a teacher/trainer have you spent on your own personal learning relating to e-learning?

	Formally in 2000 (in official work time)	Informally in 2000 (outside official work time)	Formally in 2001 (in official work time)	Informally in 2001 (outside official work time)
more than 25%	❍	❍	❍	❍
20 – 25%	❍	❍	❍	❍
15 – 20%	❍	❍	❍	❍
10-15%	❍	❍	❍	❍
5-10%	❍	❍	❍	❍
4%	❍	❍	❍	❍
3%	❍	❍	❍	❍
2%	❍	❍	❍	❍
1% or less	❍	❍	❍	❍
no time	❍	❍	❍	❍

Who has paid for your professional development in e-learning in 2000 and 2001?

	Formal programmes within work time	Formal programmes outside work time	Informal learning within work time	Informal learning outside work time
100 % of costs paid by employer	❍	❍	❍	❍
100 % of costs paid by myself	❍	❍	❍	❍
Costs shared with employer	❍	❍	❍	❍
Cost provided through public-funded national programme	❍	❍	❍	❍
Cost provided through EU-funded programme	❍	❍	❍	❍
Other	❍	❍	❍	❍

Estimate the direct costs of your learning/professional development in e-learning

	EUR 0 - 1 000	EUR 1 000 - 3 000	EUR 3 000 - 5 000	EUR 5 000- 10 000	More than EUR 10 000
In 2000					
Course fees	❍	❍	❍	❍	❍
Time off work	❍	❍	❍	❍	❍
Books and Journals	❍	❍	❍	❍	❍
CD-ROMS	❍	❍	❍	❍	❍
Travel and subsistence	❍	❍	❍	❍	❍
Other	❍	❍	❍	❍	❍
Anticipated for 2001					
Course fees	❍	❍	❍	❍	❍
Time off work	❍	❍	❍	❍	❍
Books and Journals	❍	❍	❍	❍	❍
CD-ROMS	❍	❍	❍	❍	❍
Travel and subsistence	❍	❍	❍	❍	❍
Other	❍	❍	❍	❍	❍

B.7.4. The future

Do you anticipate spending more or less time in future on acquiring skills in either designing, delivering, supporting or assessing e-learning? Please state 'More' or 'Less' and your reasons why.

More:

Less:

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Users' views on e-learning

Cedefop online surveys

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